ePAL Vision 2020 for Active Ageing of Senior Professional

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MAKE ACTIVE AGEING A REALITY

Fact: Senior professionals feel marginalized and are considered as a cost burden rather than resources, capable of "value creation"

Goal of the ePAL roadmap: Suggest actions to promote the "role of seniors" within the ageing European society and to enable them to "continue delivering professional services"

Visioning approach: Develop a "well conceived vision" as a motivating good future which can guide the society to participate in realization of this goal

What is a good Future?

A desired, ambitious, futuristic, but still

plausible and achievable, through influencing

the relevant driving forces in the market &

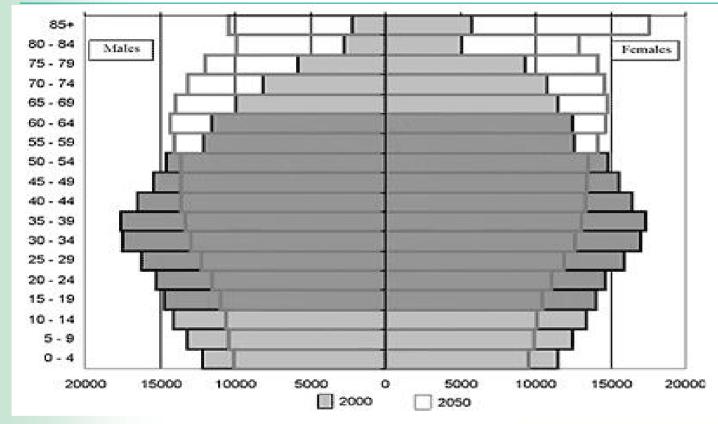
society along the way?



PRESENTATION OUTLINE

- ☐ Motivation to visioning
 - Concerns with ageing population
 - Role of the vision in a roadmap
- ☐ Elaboration of the ePAL vision
 - Systematic approach
 - Scenarios, drivers, trends
- ☐ Instantiation of ePAL vision for Europe
 - 3 Perspectives: social, organizational, technological
 - Testing and validation
- □ Conclusion

CONCERNS ABOUT AGEING POPULATION



Population pyramids comparison between 2000 and 2050 [Stranges, M 2008]

Main concerns about ageing population:

- Possible scarcity of human resources
- Overloaded pension systems
 - % of receiving benefits vs. tax payers
- Elders' frustration due to inactiveness and isolation



Need to develop a vision, and a roadmap

ROLE OF VISION IN THE ROADMAP

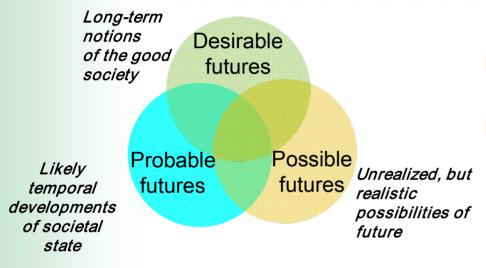
"...effective roadmapping process is reliant on significant vision as well as a commitment to what is an iterative and initially exploratory process..."

[Phaal et al, 2001]

- A Vision provides answer to the question of "What is a plausible desired future?" or "where would we like to go?"
- A Roadmap provides answer to the question of "Which actions shall we take to achieve the desired vision?"

VISIONING

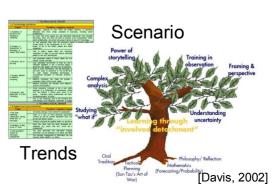
A **vision** is a picture of what a person, an organization, or a society, wishes to achieve in the future.



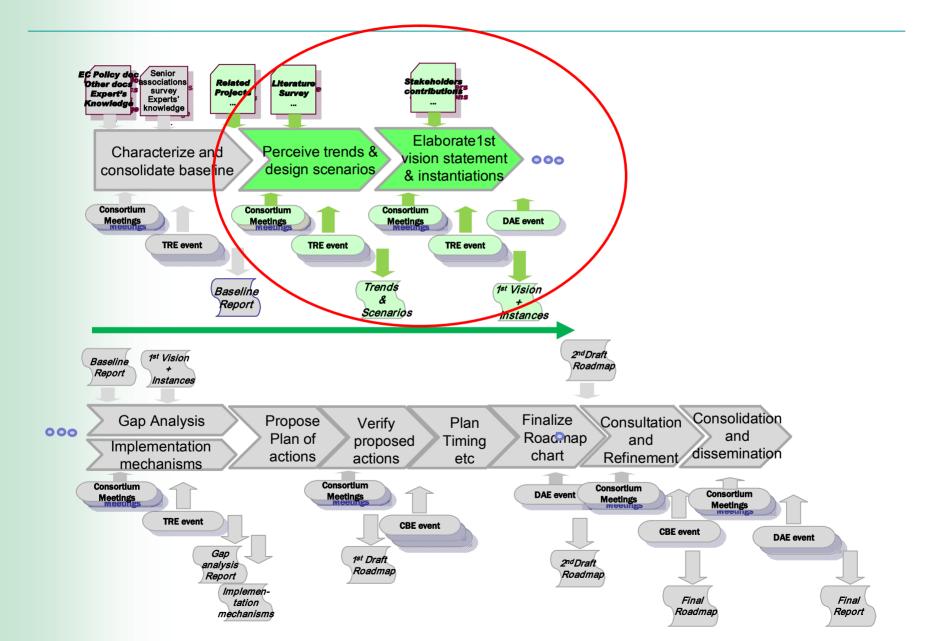
- Vision building is not a mechanism to foresee the future!
- Rather, a mechanism to define the plausible future state that we desire to reach.

Workshops with visionaries
Meetings, Interviews
Literature survey





VISION AND THE ePAL's ROADMAPPING



SYSTEMATIC VISION DEVELOPMENT

Some wishes:

Seniors inclusion in an organized community
Continued participation in society and economy
Involvement in professional activities
Involvement in social activities
Sense of "belonging"

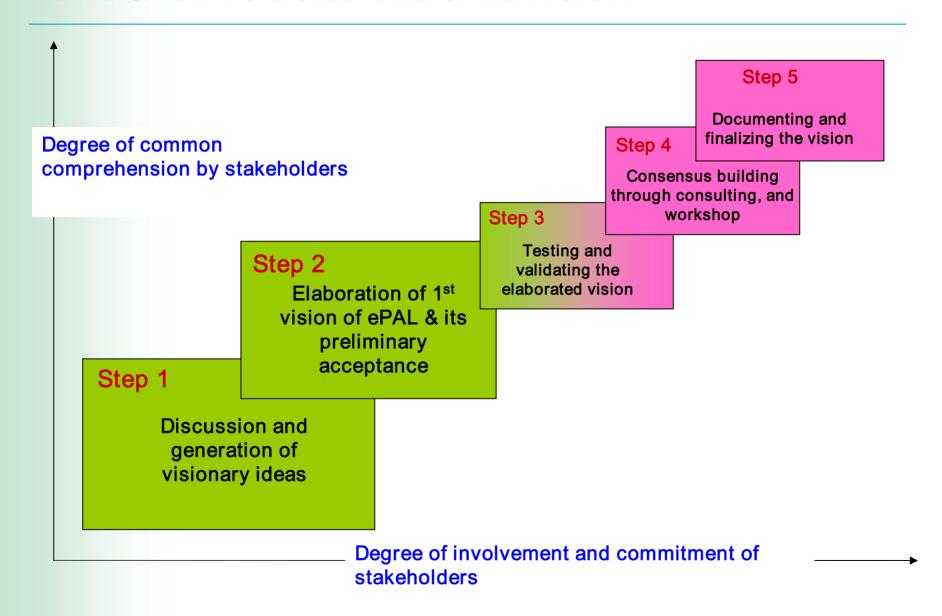
Instead of taking some ad-hoc steps to define the vision...

A well conceived vision is systematically developed, including:

- Core Ideology:
- Consisting of the core values and the core purpose for the desired future environment to exist.
- Envisioned Future:
 - Consisting of the long term audacious goals and a vivid description of the state
 of the desired future environment when the goals are achieved.

[Cummings, 2005]

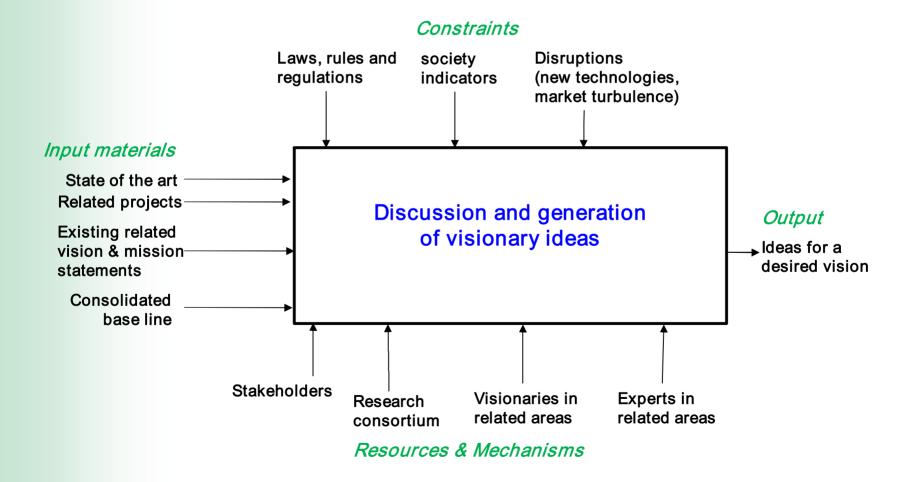
APPROACH TO BUILD THE ePAL VISION



SYSTEMATIC BUILDING OF THE ePAL VISION - Step 1

Discussion and generation of visionary ideas

• Aspects which will affect the future of ePAL in the market/society



PERFORMED ACTIVITIES IN THE STUDY

External workshops:

- •With experts:
 - 2 technical workshops
 - · In Maastricht, The Netherlands
 - In London, United Kingdom

With retired professionals

- 4 workshops
 - In Seville, Spain
 - In Maastricht. The Netherlands
 - In London, United Kingdom
 - · In Madrid, Spain

Internal workshops:

- Consortium meetings
 - 4 technical meetings were devoted to building vision
 - In Seville, Spain
 - In Maastricht, The Netherlands
 - In London, United Kingdom
 - In Madrid, Spain



Bilateral meetings

A number of bilateral meetings (UvA with other partners)

Surveys:

•Empirical survey:



- More that 10 associations of retired professionals were involved in the survey
 - · Covering Europe, America, Australia
 - · Contacts made via emails, telephones, questionnaires

•Literature survey:

- · Related technical topics
 - · Collaborative networks
 - · Behavioral modeling
 - · Affective computing, etc.
- · Topics related to visioning
 - · Building scenario (e.g. MIT Sloan)
 - Envisioning (Cumming, etc.)

Related project survey

- 7 related projects were surveyed, addressing:
 - Employability of senior professionals
 - Social, ethical and privacy needs of senior professionals
 - Technologies assisting life of senior professionals
 - E-learning for senior professionals
 - Inclusion of senior professionals
 - Ageing workforce in SMEs
 - E-governance services for senior professionals



MISSIONS/VISIONS RELATED EXAMPLES

SEN@ER – European region:

• Increased social inclusion of and improved Quality of Life for older people; employment and job creation in the regions; increase of competitiveness

PUM – The Netherlands:

• Practical and business-like: Helping small and mediumsized businesses stand on their own two feet is more effective than theorizing and moralizing

OTECI - France:

 Gathering/applying know how and experience to serve companies and nations

ASECAT - Colombia:

Be voluntary

- To use the knowledge and experience of SPs to give voluntary advice, assistance and administrative services to entrepreneurs and businesses with lower incomes
- To contribute to the society in generating value, improving the conditions of life, and promoting the socio-economic development

Associação VIDA - Portugal:

• For the intergenerational valorisation, there has to be at least two generations for increasing the interaction, cooperation and exchange /sharing of skills, knowledge and experiences

Seniores Italia - Italy:

• Mobilizing retired executives, professionals and experts in support of international cooperation initiatives promoted by international organizations, the European Union, the Italian government and NGOs in favor of emerging countries or economies in transition

REACH – United Kingdom:

 Bringing together voluntary organizations and volunteers with career skills.

ASEP - Austria:

Net of experts:

- Building a network of retired executives and experts who are ready to pass their experience, knowledge & competencies free of charge
- The potential of senior experts can be used by the whole community

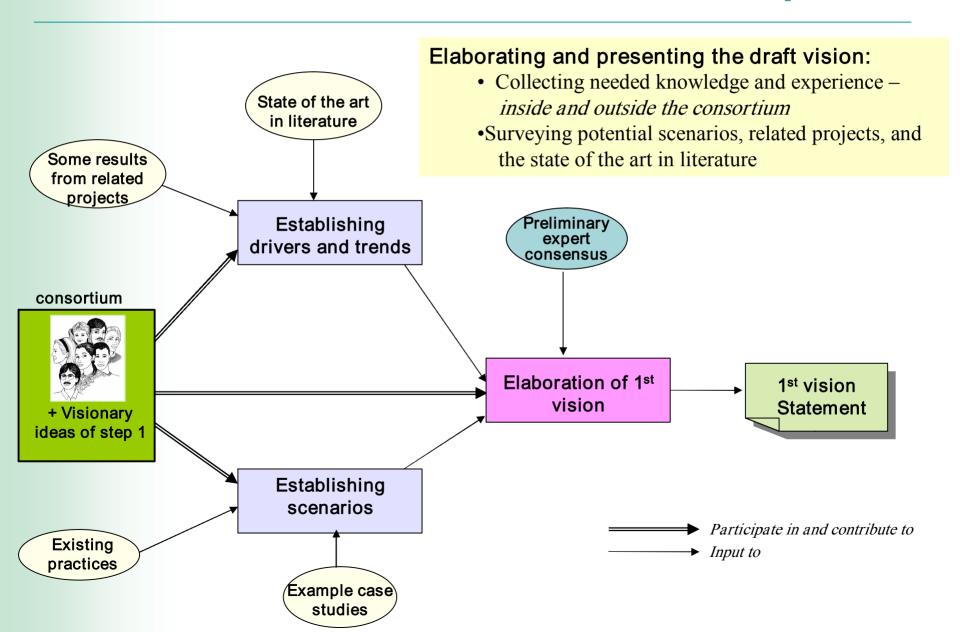
APCS – Portugal:

• To provide seniors with the opportunity of being professionally active and therefore feel included and part of the society

VAECAT - Spain:

• To offer to the society the abilities and competences acquired by the seniors during their professional careers and to stimulate the transfer of knowledge between generations

SYSTEMATIC BUILDING OF THE ePAL VISION - Step 2



ePAL VISIONING – ESTABLISHMENT OF SCENARIOS

Forecasting techniques are prerequisites for coping with the future events

Due to the shortcomings of traditional & often linear forecasting methods, during the last decade new tools and techniques have emerged

One of the most popular forecasting techniques is the so called: "scenario building"

- Having its roots in military, *scenario building as a forecasting method wa*s developed in the United States in the 1950s by H. Kahn, which has since then emerged as one of the most wide-spread tools used in both business and research context
- Scenario building in industry is on one hand very focused and on the other hand needs significant amount of time and resources
- Scenario building **In Research** has much wider scope, and at the same time cannot afford large amount of time and resources

ePAL SCENARIOS

Associations of retired professionals: voluntary work

Senior professionals association Elderly volunt

Elderly person volunteering services

Virtual Volunteering: cyber-grandparents

Identifying Problems &providing solutions A virtual well of knowledge and expertise

Associations of retired professionals: brokerage and launching

Specialized & adaptive IT systems for seniors

A service market portal

Service markets

Remote working &virtual workers

Tri-partite company

Tri-partite collaboration

Multi-actor network

Knowledgeable jubilees

Keeping the link to former employer

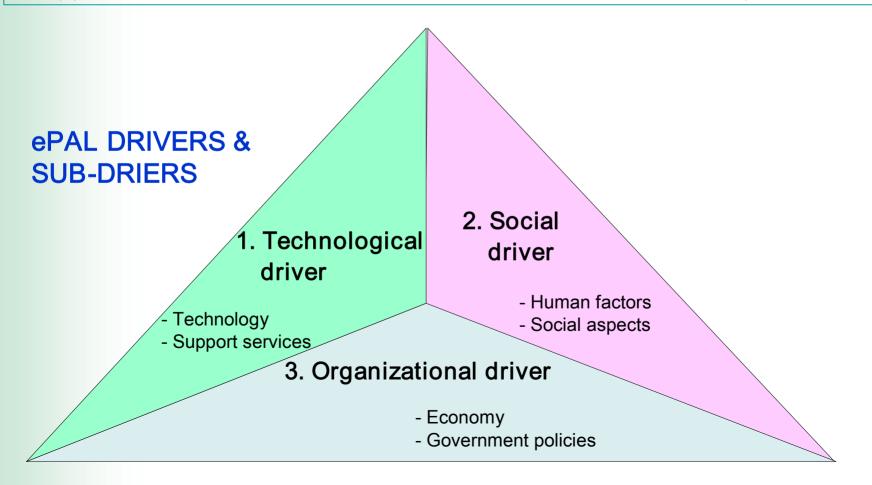
Second job

Paid work involving senior professionals

TOWARDS A VISION FOR ePAL

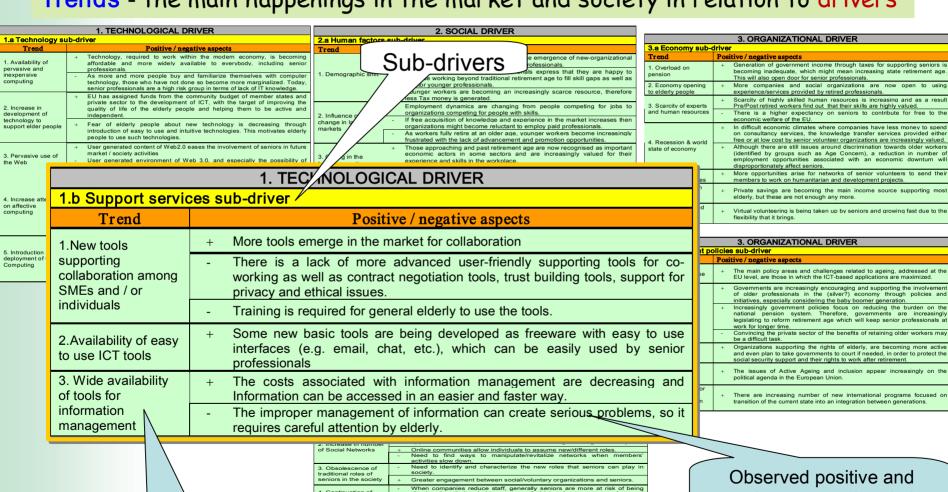
Vision describes the plausible desired future that

- is reachable through influencing the existing driving forces
- supports all defined scenarios that are "feasible" to implement



IDENTIFICATION OF TRENDS

Trends - the main happenings in the market and society in relation to drivers



Trends

Foresure on Social Security system
 Social Networks
 Foresure on Social Security system
 Social Security system
 Foresure on Social Security system Security syste

Observed positive and negative aspects in relation to each driving force

SPECIFICATION OF THE VISION STATEMENT FOR ePAL - WELL CONCEIVED COMPONENTS

Core ideology:

- Core values: "Active senior professionals, as an important part of the European silver economy"
- Core purpose: "Building a strong and cohesive social fabric"

Envisioned future:

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"

Vivid descriptions

"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),
 - 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".

ePAL's GENERAL VISION FOR EUROPEAN SOCIETY

1st ePAL environment Vision - for Active Ageing Society



Core ideology:

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

- □ 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 bodies)
- ☐ Identifies the potentials for creation of new opportunities in the European market and society

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.

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- Established national/international regulations for involvement of senior professionals in market/society and related legal frameworks

ePAL's VISION INSTANTIATIONS – INTO 3 PERSPECTIVES (driving forces)

Addressing "long detailed" set of long term audacious goals & desired facets is challenging and presents a barrier to a successful vision development and specification.

Technological perspective/

f' 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 socioeconomic system
- Security and ethical / privacy support

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Gore ideology:

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.

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Organizational perspective

Social perspective

1st ePAL environment Vision -Social Perspective

In the coming decade, extending active professional life (ePAL) will be a high priority strategy in addressing Europe's eging nopulation. The social infrastructure will mature to accommodate demographic shifts through the creation of mechanisms to support active involvement of elderly people in the silver accommy. 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.

Main desired facets:

- New mechanisms to enhance positive understanding and perception in the society regarding the value of 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 to the active labor force
- Mechanisms to support a balanced economical benefits sharing among the entire society including senior professionals
- New mechanisms for social networking to help articulate the collective needs of
- Mechanisms to support cross generational interaction between seniors and younger citizens; fomenting inter-generational solidarity and understanding within
- Mechanisms to capitalise on the increased sense of trust and understanding which comes through leveraging seniors' social capital.

1st ePAL environment Vision - organizational Perspective

In the coming decade, the primary organisational stakeholders – governments; intermediates; 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.

- Employment and retirement policies will change to provide greater flexibility for seniors to continue as economic actors
- Global regulations and polices 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 Furgoean 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
- Seniors will have access to the (re)-training services they need to facilitate their continued professional life
- New organizational cultures will positively embrace relationships between senior professionals and pre-retired (active) professionals

1st ePAL VISION -TECHNOLOGICAL PERSPECTIVE

In the coming decade, technology will facilitate and enable the continued active involvement of senior professionals in the socio-economic system. Through engagement with end-users, novel ICT collaboration platforms and tools will be developed that catalyse the creation of new organisational forms that connect and empower all stakeholders and facilitate the interaction between them. This technology will be accessible to all, 'senior friendly' and will enable seniors to expand their capabilities, leave a legacy and create value.

- VT1. Advanced collaboration support services, including 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 socioeconomic system
- VT12. Security and ethical / privacy support.

1st ePAL VISION -SOCIAL PERSPECTIVE

In the coming decade, extending active professional life will be a high priority strategy across Europe. European societies will mature to accommodate demographic shift through supporting and empowering senior professionals to fulfil their potential as active participants in the economy. Attitudes amongst individuals and organisations will evolve to embrace senior professionals as a value-creating pool of talent, thereby supporting and promoting equal opportunities in 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.

- VS1. New mechanisms to enhance positive understanding and perception in society regarding the value of the abilities, skills and experience of individual senior professionals in the economy, taking account of gender
- VS2. Mechanisms to build awareness, and to motivate senior professionals to join communities of active senior professionals
- VS3. Mechanisms to support cross-cultural interactions among senior professionals as well as to the active labour force addressing barriers to communication
- VS4. Mechanisms to support a balanced economic benefits sharing among the entire society including senior professionals
- VS5. New mechanisms 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

1st ePAL VISION - ORGANIZATIONAL PERSPECTIVE

In the coming decade, the primary organisational stakeholders – governments, intermediaries, businesses and unions – will adopt positive, proactive and coordinated policies and approaches that enable seniors to choose to continue their professional active life. As a consequence, senior professionals will enjoy new opportunities and a new market space of senior skills will be created, benefiting businesses and strengthening the wider European economy.

- VO1. Employment and retirement policies will change to provide greater flexibility for seniors to choose to continue as active economic participants
- VO2. Regulations and policies will change to encourage businesses to collaborate with senior professionals, taking account of fair competition
- VO3. The knowledge and skills of seniors will be harnessed to generate value and stimulate innovation amongst European businesses
- VO4. New forms of intermediate organizations will provide highly efficient brokerage that will create opportunities in line with market needs and that help seniors engage with businesses nationally and across Europe.
- VO5. There will be sustainable funding models from both public and private sectors

 and the political drive to support new forms of senior associations and other intermediate brokers
- VO6. All stakeholders will have access to the relevant training and other support services to facilitate the seniors' transition between working life and active retirement
- VO7. New organizational cultures will positively embrace relationships between senior professionals and pre-retired (active) professionals.

SYSTEMATIC VALIDATION OF ePAL VISION - Steps 3, 4, 5

Step 3 - Testing and validating the elaborated vision

- Measuring the effectiveness of the vision
- •Focuses on analyzing whether the vision is:
 - Capturing the current objectives,
 - Addressing future potential objectives,
 - Feasible for the society to achieve such objectives

Step 4 - Consensus building through consulting and workshop

- Methods:
 - Workshops of representatives of stakeholders' groups
 - Questionnaires and other kind of surveys
 - Round tables involving decision makers
 - Online discussions and forums

Step 5 - Documenting and finalizing the vision

- Improving the vision by incorporating feedbacks
- Documenting the final vision statement
- Documenting direction for further research

CONCLUSIONS

- Population of European countries is rapidly ageing
 - This has many social and economical consequences
- Current regulations restrict and do not motivate involvement of seniors
 - In daily economical activities
 - Especially those activities that will lead to some payments
- In some cases seniors are perceived as ineligible and incapable to participate in market / society activities
 - Need for establishing and facilitating participation of willing seniors in market / society activities

ePAL vision is derived based on careful analysis of the drivers & trends and examination of scenarios related to the ePAL environment

ePAL vision is instantiated for three perspectives (Technological, social, organizational)

