

FUTURAGE

A ROAD MAP *for* AGEING RESEARCH

“Socio-Economic Resources” Work Package 3

Report from the 1st Scientific Workshop
held in Ancona/Jesi, Italy on the 25-26 February 2010

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Authors: This report summarizes the main contents which emerged during the workshop, therefore all participants (see Annex 1) can be considered to a certain extent as co-authors of it. A crucial role was however played by the Working Groups' Chairpersons and Rapporteurs, who synthesized the WG's results into four summaries: Sara Arber, Hanneli Doehner, Kathrin Komp, Ariela Lowenstein, Tine Rostgard, Zsuzsa Széman, Sandra Torres and Hans-Joachim von Kondratowitz. The merging, integration and editing of the working groups summaries into this single report was carried out by Carlos Chiatti, Francesco Barbabella and Giovanni Lamura.

1. Philosophy and objectives of the Working Package 3 on social and economic resources

Recent evidence, coming also from large longitudinal studies, has emphasized the critical role of social and economic factors on health, well-being and quality of life in older age.

The primary task of Work Package 3 (WP3) of the FUTURAGE project, coordinated by INRCA (Italian National Research Centre on Ageing; principal investigators: Dr. Giovanni Lamura and Fiorella Marcellini) is to identify research priorities and plans related to social and economic resources in older age.

The WP3 aims at achieving this task mainly by:

- agreeing the scope of social and economic resources for the purposes of European research;
- clarifying the relationship between this stream and the other three scientific ones (WP4, WP5, WP6);
- creating a coherent framework for research findings on the socio-economic resources of later life;
- identifying any new research topics likely to emerge in the foreseeable future;
- determining the key research priorities in this field for the next 10-15 years.

According to the work-plan of the project, two Scientific Workshops involving the leading scientists in the area of socio-economic resources are planned.

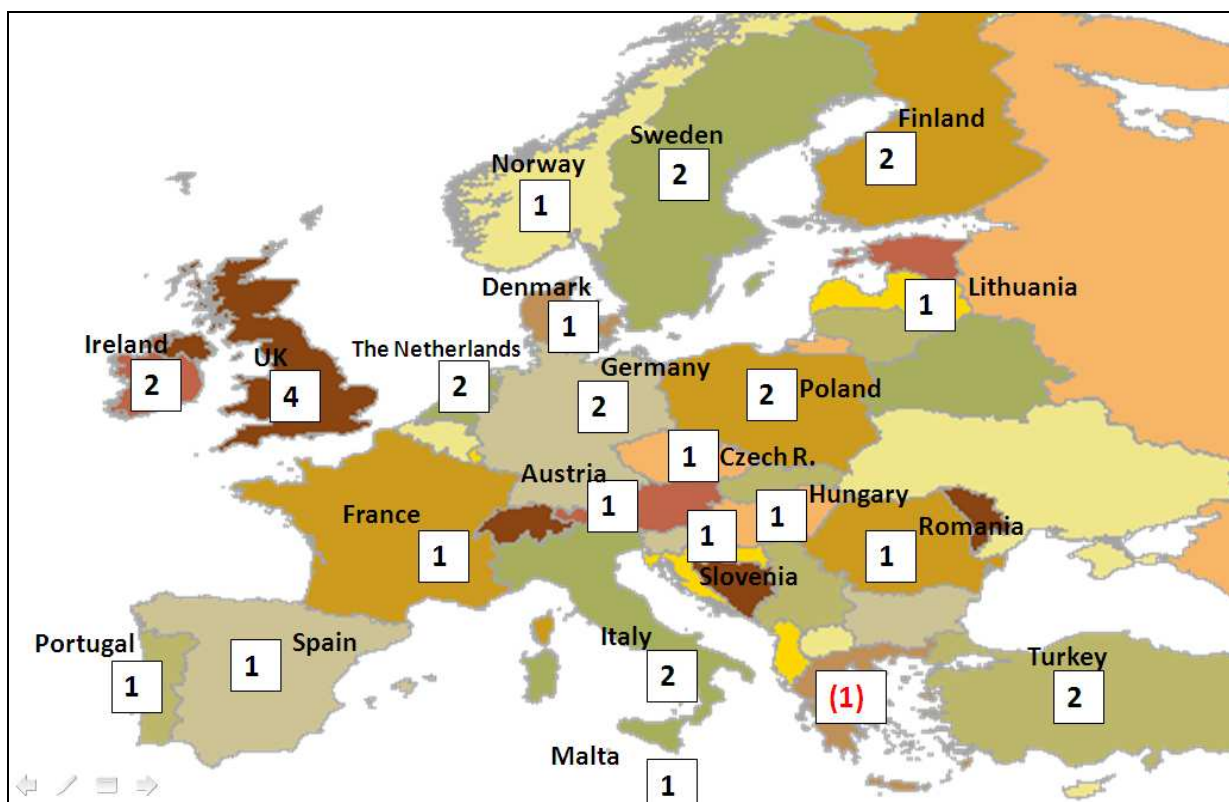
During the 1st Workshop, a broad list of relevant topics and methods for future ageing research in Europe had to be identified, through a mainly brainstorming-like exercise by means of both plenary and working group sessions. Then, in a 2nd Workshop (to be held on the 8th and 9th July 2010), these topics will be integrated and prioritised in order to develop the definitive Roadmap.

2. Approach to the workshop and methodology

Participants to the workshop

In the early stage of participants' selection, the WP3 coordinating team tried to achieve the highest "representativeness" of participants in terms of nationality, discipline and career stage (i.e. junior, mid-career and senior researchers). Results were quite satisfactory.

Figure 1. Number of participants to the workshop by nationality¹



Source: our elaborations

As the figure 1 shows, 31 scientists coming from 21 European countries plus 4 scientists from outside Europe (i.e. Israel, USA, Kenya and Singapore) attended the workshop. The gender balance was 24 females vs. 13 males. In addition, 4 members of the FUTURAGE coordination team, 2 representative of other WPs (WP4 and WP5) and 7 researchers of INRCA participated to the workshop. Overall, the participants were 48 (see annex 1 for the detailed list of participants).

Structure of the workshop

¹ A participant from Greece was invited (Dr. Costantin Prouskas) but he could not attend the workshop because of the general strike that took place in Greece during the Workshop's days.

In designing the workshop timetable, the WP3 Coordinating team tried to ensure enough time for interactions between participants both during plenary and working group (WG) sessions (see annex 2 for the detailed programme).

The aim of the plenary session was two-fold: 1) providing insights on the state-of-play of ageing research in non EU countries and in specific European countries; 2) encouraging debate between participants.

In particular, during the plenary, invited speakers provided an overview on ageing research in the US, in South-East Asia, in Sub-Saharan Africa and in two European areas normally underrepresented in the international english-speaking literature, i.e. the Mediterranean and Eastern European countries.

During the WG session, participants were divided according to their preferences into 4 groups composed by about 10-12 persons each. A Chair and a Rapporteur were identified in each WG. Their tasks, and the tasks of other participant, are described in details in table 1.

Table 1. Tasks of the participants to the scientific workshop

When	Who	What
<i>Prior to the meeting</i>	All participants	Reading in advance the preparation material that they have received by e-mail (i.e. the ERA-AGE summary; the FORUM summary and the National Consultations Reports)
<i>During the meeting</i>	All participants	Participating actively to the thematic WGs, providing stimulating insights for the discussion based on your experience and specialization;
	Chairs:	Coordinating the discussion during the thematic WGs, providing stimulating insights for the discussion based on personal experience and specialization. It was Chairs' responsibility to promote, during the WG's discussion, the development of a very first and obviously rough draft of the roadmap regarding ageing research in the area of Socio-Economic resources.
	Rapporteurs:	Supporting WG Chairs in coordinating the thematic discussion and taking notes during the brainstorming session, ensuring that all inputs are received. In this task the rapporteur operated jointly with a member of the local FUTURAGE team.
	Both Chairs and Rapporteurs:	Presenting the report of the discussion of their WG during the final session in the morning of day 2 of the workshop.
<i>After the meeting</i>	All participants	Integrating by e-mails, within 2 weeks, the suggestions and ideas raised during the WG discussion, following the indications provided by the WG-Chair.
	Both Chairs and Rapporteurs:	Receiving and collecting by e-mail, within 2 weeks, further suggestions coming from participants to integrate and/or amend the ideas raised during the WG discussion. The materials emerging from this process, in

		form of summaries, have been passed to the Italian FUTURAGE team.
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The conceptual matrix for identification of the Working Groups

The identification of the WGs followed a conceptual matrix, structured upon two assumptions:

1. the role of the older people (OP) in the society can be both active and passive. In principle, an older person represents a resource for the society where he lives, and only when frailty and dependency overcome, the demand for care and services becomes predominant;
2. the area of “care” deserves a specific attention within the more general discourse on social and economic resources. This consideration stems from the analysis of previous Coordinating Actions’ outputs and from the preliminary results of the National consultations carried out by the WP1. In the analysis of these documents appeared clearly that research on care and care systems receives a strong attention.

Table 2 describes the resulting conceptual matrix.

Table 2. A possible conceptual matrix of contents for discussion in Working Groups

<i>Perspective</i> Area	Older people as a “socio-economic” resource for society (OP for society)	Older people as users/recipients of socio-economic resources (Society for OP)
Care	Working Group 1 “Older people as caregivers”	Working Group 2 “Dependent older people”
Other socio-economic areas	Working Group 3 “Older people as social and economic resources for the society”	Working Group 4 “Socio-economic needs of older people”

It was also recommended that workshop participants should take into account cross-cutting perspectives and themes during the workshop, such as: life course approach; inequalities; gender; and intergenerational solidarity.

Key questions for Working Groups

According to the project’s work-plan, during this 1st Workshop a broad list of relevant topics and methods for future ageing research in Europe had to be identified, through a mainly brainstorming-like exercise.

The Technical Annex of the FUTURAGE project contained a list of possible topics, among which: a) Financial resources and quality of life in older age; b) Support to working family carers; c) Societal impact derived by migration; d) Provision of quality of care in residential settings; e) Elder abuse and neglect; f) Strengthen intergenerational solidarity.

However, during the plenary, participants were invited not to feel constrained by these issues, but rather encouraged to “think outside of the box” (i.e., outside of Working Group topics, disciplines, own research interests), to envision what should be the main future research agenda in this field.

In order to facilitate the process of building the Road Map, during the WG sessions Chairs have been suggested to use a list of key questions, in order to help participants in delivering their opinions. These questions were the same for all groups, reflecting the common framework of the project, but each WG addressed them according to the specific topics of interest.

The key questions were:

1. Keeping in mind recent research and policy developments, which areas/topics require, in your opinion, to be explored more in-depth and should be taken into consideration by the future Road Map for Ageing Research?
2. Which theoretical and methodological aspects should be better developed in future ageing research?
3. What should be the key priorities for comparative research in this area?
4. Which research infrastructures are necessary to deliver these priorities at a European level?
5. Which topics would benefit more from a multidisciplinary perspective?
6. How we can facilitate better links between research, policy and practice in this field (transferability of research)?

The final plenary

Before the end of the workshop, the Rapporteurs (in some case together with the Chair) reported to the plenary the main results of the WG discussions. After the four presentations, speakers received feedbacks from the plenary which they incorporated in their notes.

Work done after the workshop

After the workshop, Chairs' and Rapporteurs' duty was to write a draft of the summary of WG discussions within the following two weeks. Each draft was circulated among the WG participants, who gave their feedback to integrate the documents within the given deadline.

In addition, both plenary and WG session have been audio-recorded; the WP3 coordinating team uploaded the audio files into a provisional website, accessible only to Chairs and Rapporteurs, in order to facilitate their task.

By the 31st of March, the WP3 coordinating team received all the four WG summaries. The research and the methodological topics, and the recommendation concerning ageing research infrastructures that are listed in the following three chapters have been extracted and elaborated on the basis of these four WG summaries.

3. Broad priorities by disciplinary theme and Road Map area

3.1 Research topics

3.1.1 WG1 - Older people as caregivers

Research area "Who cares"

Rationale

Even if the health status among the community-dwelling older population in Europe is improving, given the growing cohorts of older people (OP), the absolute number of dependent OP will continue to increase in the next years. In this context, the share of OP caring after other OP will sharply increase. A deeper understanding of their characteristics and resources is therefore required.

Research topics

1.a Investigation on carers and their care arrangements, particularly in relation to three principal perspectives:

- gendered perspective (e.g. how changes in gender roles affect involvement in caring and divisions of care work between men and women);
- cohort perspective (e.g. are baby-boomers and the following generations providing care in a different way? Do new generations of men provide more care and do new fathers encourage grandfathers to be active as grandparents?);
- life course perspective: is care an activity which is steady over the life course, or are there fluctuations in care giving, not only depending on need but also on attitudes (do older men provide more caring as they age?).

1.b Informal carers often interact with professional carers and the formal care system. Deeper investigation is needed in these regards to know more about:

- how roles, tasks and responsibilities between informal and formal carers are negotiated, particularly during a crisis or transition, and what kind of relationship best contributes to sustaining good quality for both carers and recipients;
- how informal carers cope with being care managers;
- how informal carers cope with the increasing technology at home;
- what is the balance of formal and informal care and what are the perceptions on the best balance, both in terms of tasks provided but also in time invested.

1.c Focus on the carers' resources, particularly in relation to:

- available time, as EU Member States are implementing an "Adult worker model" where older workers are supposed to postpone retirement;
- the necessary functional abilities and health as well as the competences for providing care, i.e. knowledge of care work, the needs for training and how informal

carers can also inform professional carers.

Research area “Reasons for caring”

Rationale

The older population is characterized by a high heterogeneity as what concerns, for instance, the economic resources, the living arrangements, the educational level and the social networks. Moreover, Europe faces today an intense societal change that is re-designing the social relationships between different generations, also within families.

Research topics

- 1.d The relationships between carer and cared-for in a new family setting (e.g. role of grandparents in general, but also when families split up).
- 1.e How do new patterns of solidarity and individualism shape reasons for caring, e.g. how people without support network get support (e.g. is it possible to create social arenas for support, independent of parents or other family networks?).
- 1.f Impact of migration on care:
 - migration effects on OP’s involvement in informal caring in receiving countries;
 - migration poses a new situation where grandparents might act as care givers for grand children in sending countries;
 - the existence of Eastern to Western European countries care chains should be investigated.

Research area “Content of the care being provided”

Rationale

There is no universal conceptualisation of care and different cultures, sub-groups and generations attach different meaning to what care is. This gives reason for investigating differences in conceptualisations of care, but also poses practical problems e.g. in surveys measuring involvement in caring. Different national terminology also illustrate this problem, e.g. the German Sorge/Pflege, the Danish ‘omsorg’ and the French ‘soins’ which all attach different meaning to the concept and practise of care.

Research topics

- 1.g Content of the care that is being provided (caring and caring about) and which instrumental elements this involves (e.g. mental, physical, medical etc care).
- 1.h Cultural perceptions about when one is providing care, for instance:
 - spouses might not consider what they do for each other as actual care. This is the reason why spousal care tends to disappear in surveys;
 - cultural differences in the reports of caring might reflect different practises or different conceptions about care giving;

- likewise, different gender, social or ethnic groups might report differently on their care activities.

1.i The concept of quality of care and, in particular, the differences in care givers and care recipients' conceptualisation of quality.

Research area "Policies for care"

Rationale

Traditionally, the policies related to care were mainly those of providing services and/or cash benefits to the person in need and to his/her relatives. Today, new policy issues are emerging in this area and more policy-oriented research is needed.

Research topics

1.j Policies and incentives for involving OP in informal care giving, also beyond the family setting.

1.k Preferences and (moral, normative and/or legal) obligations of OP involved in informal care giving.

1.l Influence of working life on care.

1.m The rewards and costs of caring, e.g. better understandings on how care influences work life and quality of life. In particular, it is considered urgent cause to investigate what is the economic impact of being a carer, and a parallel theme on social exclusion, as employment opportunities have been lost and services have been re-drawn in the present economic crisis (how has the recession affected carers?).

1.n Community structures and city patterns facilitating caring.

1.o Structural changes in care and policies (e.g. migration and care).

1.p Care policies (legislation, support services, including policies to support carers and the implementation and effect of these).

- Care policies should be studied, also in a comparative perspective in order to understand implications of various policy arrangements, such as combinations of work and care, and in order to transfer knowledge of best practice.
- Policies should be studied in terms of legislation, cash and services, including policies to support carers and the implementation and effect of these.

1.q Company measures addressed to older carers (employer's role, problems related to the conciliation between work and care).

3.1.2 WG2 – Dependent older people

Research area "Dependency and independency"

Rationale

Despite the fact that dependency is a commonly used term in ageing research, participants to WG2 considered that the concept of dependency needed to be further explored. First of all, if in the future a better understanding of “dependency and independence” has to be achieved, it must be acknowledged the differences existing between being, feeling and acting “dependently” and “independently”. In reality, we are all interdependent of one another; it is the socio-cultural context which determines who is deemed to be dependent and the value judgement made on dependency.

Conversely, future ageing research must recognise the heterogeneity of OP understandings and experience of dependency. The question may not be “who” is dependent, but rather “how” do people become disempowered through the life-course and in different contexts. Therefore, the focus should be shifted from “dependency” to “capacities”; in this regard, lessons can be drawn from the disability movement.

Research topics

2.a Understandings of dependency and independence from two different perspectives:

- considering different stakeholders (OP themselves, their families and health and social care professionals) and acknowledging that heterogeneity is a reality (i.e. differences exist not only between stakeholders but also within the different groups of stakeholders);
- considering social policy and welfare regimes and the socio-cultural values that underlie them.

2.b Understandings of OP’s experiences of “dependency and independence”, taking into consideration cross-cutting factors such as class, education, income, gender, sexuality, ethnicity, migrant status, disability and life course transitions. In this regard:

- a better understanding of interdependence is needed;
- the co-existence of capacities vis-à-vis dependency must be researched, with regard to the fact that different actors, structures and contexts will regard these capacities differently;
- a better understanding is needed of how OP regard dependency and independence and the value they place on these;
- the promotion and use of OP’s capacities must be encouraged;
- the impact of new technologies on enabling the usage of the capacities that ‘dependent’ OP have need to be researched more specifically.

Research area “Home and residential care”

Rationale

The provision of health and social services to the increasing dependent older population represents a challenge for the welfare systems. This is a cross-cutting policy issue that brings together a range of services for dependent persons, which can be provided both in community and in institutional settings.

Research topics

2.c Home care for OP:

- Explore the understandings of quality of home care from different stakeholders perspectives (OP, their families, health and social care providers), considering also migrant care workers which may, for example, have a different view on what constitutes quality of care than care workers from the ethnic majority;
- Identify the factors that affect good quality of home care and the way in which these impact QoL of OP;
- Identify standards for good quality care that are differentiated enough to address the different caregivers' needs (spouse, adult children, gender & ethnicity issues);
- Focus on the role of civic society in care is also needed.

2.d Residential care for OP:

- Explore the understandings of quality of residential care from different stakeholders perspectives (OP, their families, health and social care providers) considering also migrant care workers which may, for example, have a different view on what constitutes quality of care than care workers from the ethnic majority;
- Identify the factors that affect good quality of residential care and the way in which these impact QoL of OP;
- Identify standards for good quality of residential care that is differentiated enough to address the different caregivers' needs (spouse, adult children, gender & ethnicity issues);
- Alternatives to residential care: mapping existing provisions, promoting new forms of care;
- Focus on the role of civic society in care is also needed.

2.e Impact of cross-cutting factors on home and residential care use: social policies and welfare regimes, impact of income & housing (structural factors), impact of formal and informal care mix.

3.1.3 WG3 – Older people as social and economic resources for the society

The WG3 was formerly named “Active ageing”. Participants to this WG, however, decided to change this name, since they were concerned that the term “Active ageing” would have stressed too much on the labour market participation.

Research area “Prerequisites for OP as socio-economic resources”

Rationale

Ageing populations do not necessarily constitute a problem for welfare states, since OP can act as a socio-economic resource for society. This is already well-know in theory, but empirical evidence and detailed information, which could also be used for policy

formulation, are still missing. This WG reflected initially on the prerequisites for OP's role as a socio-economic resource for society, which deserve to be studied more carefully.

Research topics

- 3.a Supportive environment (transport, physical environment); urban planning, urban design; "age-friendly cities", territories.
- 3.b Health, capacities, dementia (ergonomics to balance that).
- 3.c Money and wealth.
- 3.d Lifelong learning & teaching older persons; universities of the third age; role of media for education.

Research area "Main activities of OP as socio-economic resources"

Rationale

After considering the prerequisites for OP's role as a socio-economic resource for society, ageing research should inquire on which are the fields where their activity would be value the most. The participants to WG3 have identified five main activities, or "dimensions", through which OP can act as a socio-economic resource for society. These dimensions are interconnected and there might be a crowding in or a crowding out between them. More knowledge is required on why people choose any of these activities and on how the activities can be combined and interact.

Research topics

- 3.e Activities in the labour market:
 - the motivations of persons to work longer (avoid unemployment);
 - obstacles and limitations to paid work in old age;
 - the role of ergonomics in prolonged activity;
 - differences and relations between the public and the private sector in older persons' activity in the labour market;
 - the middle-aged individuals' plans concerning work and retirement;
 - role and influence of legislation & pension schemes on older workforce participation (e.g. can they force people to be longer active in the labour market?);
 - the effects of the current financial crisis for older persons' workforce participation;
 - the diverse forms of discrimination in the labour market;
 - the role of OP in black and grey market.
- 3.f Activities within the family (see also previous par. 3.1.1 on results of WG1):
 - OP as informal care-givers within the family;
 - grand-parenting and parenting;

- work-life balance;
- partnership & sexuality;
- intergenerational care, relations & transfers (financial and non-financial);
- effects of changing family structures;
- role of gender for activities within the family, more information in men's role needed;
- definition of care within the familial context (how does it change with changing family structures?).

3.g Learning/teaching:

- peer teaching & intergenerational learning, mentoring;
- the role of new technologies (ICT);
- preparation for old age through knowledge, e.g. financial literacy;
- age-integration vs. age-segregation in programmes for learning;
- how do institutions prepare for teaching to older persons (capacity-building)? Analysis of curricula within the life-long learning programmes;
- functional literacy in old age;
- formal, informal and non-formal learning, life-long learning;
- study the effectiveness of existing programmes;

3.h Volunteering and active citizenship:

- political participation, associations and grey power;
- the political, cultural and geographical context of volunteering in old age;
- the changing character and motivation for volunteering (from social volunteering to civic engagement etc.);
- older volunteers solving social problems (in which sector?), contributing to the care for older persons and to their social integration;
- the economic value of volunteering;
- links between volunteering and the labour market.

3.i Activities of everyday life: fashion, ICT & media use, social relationships, sleep/rest, time use, leisure, mobility, sports (separately and in connection with each other).

Research area "Effects of OP's role as socio-economic resource for the society"

Rationale

The effects of OP's role as a socio-economic resource for the society need to be studied more closely. The characteristics and size of these effects are particularly important since they probably influence the attention that the results of research will get from policy-makers and the public in general.

Research topics

3.p Effects for individuals:

- in terms of identity (does the role as a socio-economic resource to society gives you an identity? How? Which identity? What about illness? Is there also an identity when OP cannot take up this role?);
- perceptions of ageing: experiences of younger generations;
- intergenerational solidarity (more than economics), relationships, inside and outside the family;
- attitudes and expectations of people of different generations towards OP' contribution to society;
- it brings social participation and also social inclusion? Is it a mean for reaching social inclusion beyond the labour market? Does it bring empowerment? (Or is it empowerment a result or a prerequisite for this role?)

3.q Effects for governments, society, welfare states, companies, in terms of:

- social cohesion;
- money saved by the governments;
- space occupied in the public (physical environment) by active older persons.

Research area: "Cross-cutting topics in the activation of OP' potential"

Research topics

3.j Preparation for old age (in general and in specific: financial literacy, nutrition, ICT, psychological, etc.).

3.k Generations and social relations:

- changes across generations (more research on cohort vs. life-course effects);
- intergenerational relations, contract, solidarity and justice;
- social networks;
- changing societal attitudes towards old age and towards OP' activities.

3.l Public policies; individual choice vs. policy-driven changes.

3.m Inequalities (e.g. migrants and non-migrants; social class; third agers vs. fourth agers; gender; educational level; cultural differences).

3.n Normative expectations vs. choice; normative character of different concepts, especially of those connected to "activity" and "productivity" – "better ageing", 1st and 2nd class ageing.

3.o Barriers and opportunities for the different activities; societal infrastructure; removing barriers for OP to be active in the labour market and in society: the extent, level and

mechanism of age discrimination in different sectors (employment, health care, social care, welfare, decision making and others).

3.1.4 WG4 - Socioeconomic needs of older people

Rationale

The research topics identified by the WG on socioeconomic needs of OP can be grouped in four areas: 1) Social/health needs of OP; 2) Economic needs of OP; 3) Cultural needs and 4) Vulnerability of OP.

Research topics

4.a Social/health needs of OP

- social inclusion and participation;
- media representations;
- social solidarity mechanisms in the society and in the family;
- a new sociology of generations would be empirically helpful in identifying processes of material and non-economic transfers.

4.b Economic needs of OP

- income maintenance;
- pension system developments;
- different provisions to cover long term care needs;
- consumption patterns over the life course; Effects of the ongoing financial crisis and the impact on the social relations between age groups or cohorts.

4.c Cultural needs of OP

- religion and spirituality development.
- communication and media utilization on ageing at the societal level (access to information, digital divide).

4.d Vulnerability of OP

- elder abuse and neglect, with particular focus on the condition of 'dependent' OP: impact of socio-economic factors, impact of welfare state arrangements, impact of different contexts (residential homes vs. 'private' homes);
- living arrangements of different groups as for instance those living alone, of trauma refugees;
- accumulation of life-long disadvantages including disabled elders as well as isolated elders in the rural areas;
- socio-economic inequalities which continue over the life course into old age.

3.2 Methodological issues and recommendations

Each WG discussed independently about methodological issues and challenges. Not surprisingly, merging their outputs, commonalities have been found across groups. This paragraph integrates and summarises the issues and the recommendations arised during the discussions, grouped in four headings:

- Methods and study design;
- Data accessibility;
- Coordination and collaboration in ageing research;
- Interdisciplinarity.

“Methods and study design”

5.a Advances are required in the study design with regard to the following:

- expand the use of longitudinal studies, follow-up studies (we also need better data for that), and cohort studies;
- need to develop methods (e.g. randomized trials studies) that allow us to identify cost-effective interventions;
- develop indicators that measure the effect of research projects/political intervention;
- time for implementation of research is needed.

5.b Clarify the links between qualitative and quantitative research. It is difficult to combine quantitative and qualitative research methods in order to proceed with real empirical studies:

- shared definition of mixed methodologies: descriptions and interpretations, how to mix quantitative and qualitative methods (triangulation);
- need for qualitative research that builds on the existing body of knowledge gathered through quantitative means (i.e. need for qualitative research to generate new questions, for instance as far as the dependency / independence continuum is concerned);
- necessity of a conceptual-theoretical framework which will have to guide empirical research and therefore also the choice of appropriate methods or an appropriate mixture of methods.

5.c Develop new methods:

- need for new research methods to deal with the variety of upcoming social constellations in ageing societies;
- further develop specific methods: social network analysis, time use studies, risk maps;
- adapt existing methods/approaches: (multilevel) analyses should also include the regional level;
- make transparent the assumptions of research design and use this explicitness for

reflecting about the adequate decisions in design and methods.

5.d Theoretical research and definitions:

- funding research on theory-building and developing methodology;
- definition of “old”: chronological age (which age group?) vs. life-phase;
- old age is heterogeneous (young old vs. old-old; low vs. high income; men vs. women; etc.). Need to address inequalities in old age;
- definition of “active ageing”: consider it over the life-course, at the micro- and the macro-level; is it normative? It should not be work-centered, also include volunteering etc.

5.e OP participation in research:

- involving older persons in identification of need for research and how to design research.
- need to regard “dependent” OP as theoretically rich sources of information.
- need to develop methods to include cognitively impaired OP.

5.f Having a focal point somewhere that could be consulted on methodological issues such as comparative research, survey design (e.g. translations and cultural meanings of care) and on concepts and terminology (e.g. what is a carer?).

“Data accessibility”

5.g Giving value to existing data:

- need of a data centre that can provide overview of available quantitative data and how to access this, e.g. open access to European Foundation survey data;
- need for re-visiting data and results;
- need to review current data sources across countries and topics in order to identify knowledge gaps;
- need for repositories of previously funded EU-projects on ageing.

5.h New data needed:

- more comparable data needed and knowledge on how to use these data;
- need to develop the descriptions of the contexts in which data is collected (i.e. the issue of authenticity);
- need to expand the approaches used to collect qualitative data.

“Coordination and collaboration in ageing research”

5.i Coordinating current ageing research

- links between research projects (this requires planning and funding, and could be a

role for the DGs to bring people together);

- literature reviews that summarize what European collaborations have accomplished so far are needed.

5.j Coordination and collaboration in future ageing research

- need to ensure that new Member States are represented in new projects.
- need to widen research projects to include countries outside Europe (especially developing countries): this will add value to our understanding of what is happening in our multicultural societies.
- data and information need to be collected in particular for the countries that were underrepresented in research until now: Southern and Central and Eastern Europe.

5.k Comparability issues arised during the discussions:

- how to compare social inequalities within and between countries;
- is “active ageing” and the civic obligation to be productive in old age different among countries? How? Are the activities through which one can be active the same?
- how to compare social roles, life-phases, social identities, labels of old age across countries and cultures;
- use of instruments, questions, concepts, definitions that are validated across countries;
- taking into account conditions which might be quite diverse according to the national or cultural backgrounds in and across countries and would not allow any sensible general priority setting;
- the array of the usual statistical instruments and nation-centered designs of research clearly favor any concentration on the “nation” as the decisive and exclusive point of reference for comparative work. But the societal changes in the social composition of nations due to migration and transnational dynamics do not allow anymore to concentrate exclusively on national dynamics thereby neglecting the increasing weight and importance of these new “internal” cultural influences and conceptions.
- analyses of cross-border relations between nations may prove to be even more helpful and elaborative than simple comparisons on a national basis alone.

“Interdisciplinarity”

5.l The need to recognize that interdisciplinary research is particularly valuable for influencing policy and practice.

5.m In one WG has been argued that “all of the topics mentioned during the discussion would benefit from an interdisciplinary approach”. This WG was very skeptical about the usefulness of singling out topics which promise to benefit more from a multidisciplinary research perspective. Decisions to choose a multidisciplinary

perspective are not at all self-evident but they have to be justified on the basis of good reasons in theory and method. Not every subject has necessarily to be studied and researched in a multidisciplinary manner.

5.n The importance of multidisciplinary depends on the intended use of the research:

- if a research project is meant to enhance the knowledge within a scientific discipline (theory development, l'art pour l'art), then multidisciplinary is not necessary;
- if research results are supposed to build bridges between disciplines or between research and practice, then multidisciplinary is required.

5.o Caveats: be sure not to lose sight of the gerontological roots when embarking upon multidisciplinary:

- participating disciplines in research have different weights in the scientific field and even more so in the eyes of an interested public domain. An imbalance between natural sciences and social sciences play out not only in theory and method, but also in the promises which can be directed to the policy field and which are responsible for establishing further support structures of gerontological research.
- in order to demonstrate the public pressure on disciplines for cooperation, the British model of “sandpit” was mentioned in which scientists from different disciplines are forced together for a very condensed time period in order to work out a multidisciplinary research perspective.

3.3 Infrastructure and transferability issues and recommendations

As for the methodological issues, each WG independently discussed about infrastructures and transferability of ageing research. However, in this case participants to the WGs delivered contrasting opinions, especially as what the possibility of creating a European Central Institute on Ageing.

The issues discussed have been grouped into five headings:

- The hypothesis of an European Central Institute On Ageing;
- Funding ageing research in Europe;
- European ageing research agenda and coordination among countries;
- Transferability of ageing research;
- Capacity building.

The hypothesis of an European Central Institute On Ageing

6.a A coordinating body is needed to ensure that the Road Map is achieved, a new coordinating agency able to lobby for funds, collect information and avoiding duplication. Collaboration with national funders will be needed. Something like the “New Dynamics of Ageing” model in the UK could be adapted (<http://www.newdynamics.group.shef.ac.uk/>).

6.b However, the idea of a European version of the NIA was questioned in one WG, since it was not clear to participants what the purpose of such an institute will be: is it going to be funding? Is it going to focus on the dissemination of results? Is it going to ensure

that the wheel is not invented in every country? Hence, the suggestion to establish a European central institute on ageing research was either met with great scepticism or directly refused because it is expected that a high degree of unwelcome politicization of the institute would be detrimental to gerontological research, rather than helpful. Furthermore, experiences from the USA show the importance of a discipline-oriented selection of the management personnel and of adequate personalities, a problem which would be enormously intensified under conditions of continuous and possibly increasing competition among the states in the widening European arena.

6.c The model of a “permanent forum” has been advocated with a clear preference for an orientation toward an exclusive scientific discourse without direct political interference. Such a forum could follow the objective to support and help still underdeveloped areas of research and thematic fields which need intensive research work. In order to evaluate ongoing research and to support the design of further research projects, the establishment of an EU clearing house has been suggested. Also the training of young scientists in the area of gerontology has to be an objective of coordinating agencies on the European level.

Funding ageing research in Europe

6.d More funds are needed to improve the quality of research in ageing problems (however, it has been remarked also that in gerontological research there are several underused empirical studies whose richness in material and relations have never been exhausted).

6.e A systematic development of “follow-on funds” would be useful in order to give money from different support settings to follow the implications and consequences of results from finished projects or to help further inquiries within the data set of such projects.

European ageing research agenda and coordination among countries

6.f A shared European agenda on ageing research could facilitate the advocacy of national focuses.

6.g Make population census data available for research in all European countries (could one also harmonize census data?).

6.h Increase the capacity of the countries where the structures for aging research aren't developed yet. New research infrastructures are needed in particular in Southern and Central and Eastern European countries (e.g. access to online journals, computer programmes, research networks, virtual forums).

Transferability of ageing research

Experiences with the funding and support structures of the EC have caused large disappointment among researchers because of the low representation of projects on the policy level as well as with the lack of monitoring activities concerning finished projects. In addition, participants to the workshop believe that research on a European level faces

difficulties in reaching both national and EU stakeholders. There is seldom interaction between the various DGs and research participants beyond the reporting of how funds are spent.

It has become clear to all participants in European projects that the decision-making structures follow the logic of immediate utilization in policy connections, while the researchers follow the logic of scientific community, with a longer and different perspective on transferring results.

There is in general a need to build in the funding of research more time for implementation of research and for creating links between research projects. The latter requires also planning, and it could be a role for the various DGs involved to bring people together, in order to compare results of different, but related research projects, and to facilitate a discussion and plan for how to link results with policies and practices.

6.i Need for practice oriented research and for relating empirical and theoretical results to policy-making:

- select research topics that are indeed important for the OP themselves (increase quality of life etc.)
- select research topics that are relevant for policy makers, e.g. how to save money (do marketing for your research, use the policy-makers' language)
- recognize that multidisciplinary research facilitate transferability; different expertises are needed if true transferability is to be achieved.
- recognize that resources are needed in order to facilitate transferability. Funders need to recognize that the transferability of research findings is a costly endeavor and resources need to be allocated for this purpose.
- utilize the emerging expertise in implementation sciences to increase the capacity for knowledge transfer.
- action based research is also needed.

6.j Get stakeholders (users, NGOs, employers) and OP involved in research.

6.k There have been nevertheless no sufficient procedural and institutional settings on the European level to open up continuous ways of negotiating between the partners in research and policy. It remains an open question whether the suggestion to exchange for a certain time policy makers from the administration with researchers and vice versa will be really helpful to bridge different conceptions of reality from both sides.

6.l Most of the results of gerontological research are particularly valid on the community level in which experiments of interlocking models of administration and social science are more common and can look back on some history of transferring results to practical social work. Additionally, this form of tacit dynamisation of transfers will be of increasing importance in a society where research concepts and planning in the area of service delivery and engagement will be more and more influenced by public-private partnerships and other mixed arrangements.

- 6.m The continued EU involvement in education of coming generations of researchers is recommended. A common institutionalised approach may benefit to qualify the various educational programmes in the field, e.g. the EUmag (European Master in Gerontology), which has remained a small programme, unrecognised by any university.
- 6.n Create opportunities for learning about comparative ageing research and to exchange experiences (at summer schools and workshops?).
- 6.o Tailoring Marie Curie initiatives for the needs of aging research.
- 6.p Coordinated efforts seem to be needed for doctoral students but also senior researchers should be considered, e.g. the Marie Curie program may not be attractive for senior researchers with family and work responsibilities, as it requires long spells abroad. The programme is also highly competitive.

4 Summary of key overarching issues

- 4.1** During the brainstorming sessions and the plenary, many research topics and issues concerning methodology and infrastructures in ageing research have been identified. In the previous paragraphs research topics have been listed by WG (par. 3.1), methodological issues discussed (par. 3.2) and infrastructures in ageing research described (par. 3.3), as emerged during the workshop.
- 4.2** The workshop's results allow to distinguish two types of research topics: "*traditional*" and "*emerging*". The former refer to those which have been already identified during previous Coordinating Actions, while the latter are those that have been mentioned for the first time during the Scientific Workshop. The reasons for mentioning "traditional" topics during the workshop relate to the lack of definitive evidence or to the need to address them from a different perspective. Examples of these topics are:
- the study of participation of OP in all the dimensions of society (see 3.e, 3.f, 3.g, 3.h, 3.i) .
 - the possible reforms of the welfare state (e.g. policies to activate OP in caregiving, improving efficiency and effectiveness of the Long-term Care system and the sustainability of the pension system – see 1.j, 2.d, 4.b).

Examples of "emerging" topics are:

- the study of the new dynamics of population migrations and ageing (e.g. the role of Migrant Care Workers and the effect of international migration on OP's activities in sending countries – see 1.f);
- the effect of the new family settings on caregiving activities (see 1.d);
- the effect of the economic crisis for the OP (see 1.m, 3.e, 4.b);
- the role of companies in the future welfare for the OP (see 1.q).

- 4.3** In the discussion over the "traditional" research areas, participants to the workshop expressed their concerns about the lack of transferability of research findings into practice. For instance, ageing research has demonstrated already the potentiality of OP in volunteering, but the level of their participation in volunteer activities has to be further increased. In this regard, the researchers deemed as fundamental to increase the involvement of end-users and relevant stakeholders in the research process.
- 4.4** The need to improve coordination of ageing research in Europe has been mentioned in several occasions. In particular, participant researchers referred several times about the negative effects that derive from the lack of adequate coordination, i.e. existing data are not fully exploited, duplication of studies and several good-level researches which are not disseminated.
- 4.5** Moreover, a recurrent topic was the need to fill the research gap between different EU regions. In particular, researchers from Southern and from Central-Eastern Europe pointed out that their national context could benefit to a large extent from the experience of Northern and Continental Europe colleagues, if this could be shared in proper ways.

- 4.6** At the same time, the hypothesis of a European Institute on Ageing, as a European version of the US based NIA, was controversially discussed. Concerns for an excess of bureaucracy and for the risk of politisation of ageing research have been raised, and a proposal for a more flexible coordinating body (like a permanent Forum of Ageing Research) has been discussed.

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Annex 2. Programme of the workshop

DAY 2 (25th February)

9:00 Opening Plenary: Welcome, introduction & background to the project (30')

- Dr. Fiorella Marcellini on behalf of Antonio Aprile (INRCA Director General): welcome to participants (10')
- Dr. Giovanni Lamura (INRCA), coordinator of FUTURAGE WP3: introduction (20')

9:30 Presentations: State-of-art and current international trends in ageing research (105')

- Prof. Toni Antonucci (University of Michigan, US): *Life span and life course perspectives on socio-economic resources* (20'+ 5' for "quick" questions)
- Prof. Kalyani Mehta (National University of Singapore): *Trends in ageing research on older persons as socio-economic resources in some South-East and East Asian nations* (20'+ 5')
- Dr. Isabella Aboderin (University of Oxford, UK): *Older persons as contributors to socio-economic development in Sub-Saharan Africa (SSA): a research agenda* (20'+ 5')
- Discussion (30')

11:15 Coffee break (30')

11:45 Working group session (90')

Four Working Groups in parallel (see Annex below on possible contents of single WGs):

WG1: *Older people as caregivers* (room "Azzurra")

Chair: Hanneli Döhner (University of Hamburg-Eppendorf)

Rapporteur: Tine Rostgard (Danish National Institute of Social Research)

WG2: *Dependent older people* (room "Picasso")

Chair: Sara Arber (University of Surrey)

Rapporteur: Sandra Torres (Linköping University)

WG3: *Active ageing in society* (in plenary room)

Chair: Szusza Szeman (Hungarian Academy of Sciences)

Rapporteur: Kathrin Komp (VU University of Amsterdam)

WG4: *Socio-economic needs of older people* (room "Spontini")

Chair: Ariela Lowenstein (University of Haifa)

Rapporteur: Hans-Joachim von Kondratowitz (IAGG- Behavioural & Social Science section)

13:15 Lunch (60')

14:15 Presentations: State-of-art and current trends in Southern and Eastern Europe (75')

- Prof. Zsuzsa Széman (Hungarian Academy of Sciences): *A road map for ageing research in Eastern Europe: reflections from a labour market perspective* (20'+5')
- Prof. Alexandra Lopes (University of Porto, Portugal): *Socio-economic dimensions of ageing in South Europe: resilience and change in the research agenda* (20'+5')
- Discussion (25')

15.30 Coffee break (30')

16.00 Working group session continued (90')

17.30 Briefing with WG Chairs and Rapporteurs only

18:00 End of first day session

19:00 Bus to Ancona for a short visit and dinner

DAY 3 (26th February)

09.00 Working group session continued (finalising feed-back for the plenary) (100')

10.40 Coffee break (20')

11.00 Feedback of working groups to the plenary (120')

- WG1 (10')

- WG2 (10')

- WG3 (10')

- WG4 (10')

- Discussion (80')

13.00 Lunch and departure of participants