

**Work Package 3**  
**“Social & Economic Resources”**

**Draft report on the 2<sup>nd</sup> Scientific Workshop  
held in Ancona (Italy) on 8<sup>th</sup>-9<sup>th</sup> July 2010**

*Integrated with suggestions and remarks from the Expert Meeting  
held in London (UK) on 22<sup>nd</sup>-23<sup>rd</sup> September 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: Lars Andersson, Hanneli Döhner, Kathrin Komp, Alexandra Lopes, Zsuzsa Széman, Judith Triantafillou and Hans-Joachim von Kondratowitz. Furthermore, also scientists who attended only the Expert Meeting in London (22<sup>nd</sup>-23<sup>rd</sup> September 2010) gave an important contribution for the revision of the report: Tony Maltby, Chris Phillipson and Alfonso Sousa. The merging, integration and editing of Working Groups summaries and Expert Meeting remarks into this single report was carried out by Carlos Chiatti, Francesco Barbabella and Giovanni Lamura.

## Introduction

FUTURAGE is a broad project funded by the European Commission and aimed at developing a Road Map for Ageing Research in Europe for next 10-15 years. In order to identify the most important issues and priorities that should be taken into consideration in the next European research agenda, the ageing research field has been subdivided into five broad Themes, each one included in a Work Package (WP) and dealing with different areas of research. The five Themes are: Biogerontology (WP2), Social & Economic Resources (WP3), Environments of Ageing (WP4), Healthy Ageing and Well Being (WP5), and Users Agenda (WP6).

The WP3 on Social & Economic Resources, which is coordinated by INRCA (the Italian National Research Centre on Ageing; principal investigators: Dr. Giovanni Lamura and Dr. Fiorella Marcellini; project manager: Dr. Carlos Chiatti), is mainly based, similarly to the other WPs, on a consultation process involving, among other events, two Scientific Workshops. These are meetings in which scholars, researchers and experts have been asked to discuss about the research priorities from an multidisciplinary point of view. The 1<sup>st</sup> Workshop was held in Ancona (Italy) on the 25<sup>th</sup>-26<sup>th</sup> February 2010, and a report has summarised its main outcomes.

This report summarizes the results of the 2<sup>nd</sup> Workshop, held in Ancona (Italy) on 8<sup>th</sup>-9<sup>th</sup> July 2010, and it is integrated with remarks provided by an Expert Meeting, held in London (UK) on 22<sup>nd</sup>-23<sup>rd</sup> September.

The report is structured as follows:

- **Chapter 1: Context and contents of the “Social & Economic Resources” Theme**  
Brief overview on key concepts and the multidisciplinary context of the research Theme.
- **Chapter 2: Objectives of the 2<sup>nd</sup> Workshop and methodology used**  
Description of the main goals expected from the Workshop, instruments provided to participants (WP3 conceptual framework and questionnaire on ageing research priorities) and summary of the workshop organization (information on participants’ tasks, Workshop structure, Plenary and Working Group sessions).
- **Chapter 3: Results: research priorities by Working Group (WG)**  
Synthesis of the research priorities identified by each WGs as well as of the definition of main cross-cutting perspectives and key issues in methodology, infrastructure and transferability to be taken into account.
- **Chapter 4: Discussion and summary of key overarching issues**  
Review of the WP3 outcome: general remarks about the consultation process and reorganization of WGs results into research areas in relation to the Theme.
- **Chapter 5: Toward the Road Map: suggestions and remarks**  
Summary of the main issues to be addressed to develop the definitive Road Map for ageing research in Europe: proposals concerning document organization, level of details, target audience, document evaluation phase and more others are treated in this section.

## **1. Context and contents of the “Social & Economic Resources” Theme**

Ageing is a developmental process affecting individuals but also societies. Therefore, the research object of this Theme concerns “also” and not “only” older people and their relations with social and economic resources: we should deal instead both the process of ageing at societal and individual level, considering also how it influences the different cohorts of the population.

Therefore, the Theme focuses on how the availability (or lack) of social and economic resources might affect the ageing process of individuals and societies along the life course, and this in turn exerts an impact on the whole society.

This means, in the first place, that we should clarify any instruments, mechanisms and social institutions involved in providing resources to ageing individuals or taking resources from them, thus intending “resources” both in an active perspective and in a passive one.

Moreover, the concept of “resources” should include not only a full application of individual and societal potentialities (resources that are effectively spent), but also the gap between potentialities and the real provision (resources that are not used).

In addition, we should distinguish between the concept of “owning” resources (to “have” resources) and the concept of “being” a resource (to “be” a resource for oneself, families, society and welfare state).

Within this Theme, we have also to integrate different disciplinary approaches. On one hand, we should consider social resources as the set of means provided or used by individuals through social relationships and with a social value (attached by individuals or by social representations): i.e. activities in the family, volunteering, social capital as well as cultural and educational activities. On the other hand, it is crucial to incorporate also an economic approach, focused on the economic and financial value of the resources produced or spent: here a major role is played for instance by the position in the labour market, by housing and financial assets, as well as by the access to pension and welfare system benefits.

In many cases, it is not possible to distinguish between the two approaches, so that often the social value of an individual action could be treated also from an economic point of view, and vice versa. Therefore, a related key issue of this Theme is the need of an multidisciplinary approach able to integrate contributions from different research fields. Sociology, economics and gerontology are of course the main disciplines, but we have to consider also the overlapping areas with disciplines such as psychology, demography and health services research, just to mention the most obvious ones.

Last but not least, in developing the conceptual framework for the WP3 scientific workshops, we took into account the possibility of some overlapping issues with other Themes, especially with those related to WP4 on Environmental Gerontology (e.g. ergonomics, transports, etc.) and to WP5 on Healthy Ageing (e.g. active ageing, labour market, etc.).

## 2. Objectives of the 2<sup>nd</sup> Scientific Workshop and methodology used

The main goal of the 2<sup>nd</sup> Workshop was to reorganize the results from the 1<sup>st</sup> Workshop in order to obtain a final list of research priorities to be considered for the definitive Road Map. To achieve this goal, the WP3 coordination team provided before the Workshop two instruments to serve as the basis for the discussion during the WG and plenary sessions: 1) the *new conceptual framework* for Social & Economic Resources in ageing research, and 2) the *questionnaire* to identify priorities for future ageing research in Europe.

### 2.1 The conceptual framework for the Workshop

A specific conceptual framework was developed for discussion both in the 1<sup>st</sup> and 2<sup>nd</sup> Workshops, in order to facilitate the debate within WGs and the collection of participants' opinions on research topics and issues.

The framework proposed for the 1<sup>st</sup> Workshop was revised to take into account the suggestions provided, as a feedback to the report on the outcomes of the meeting, by internal FUTURAGE bodies such as the Council of Scientists (CoS), the Network Steering Committee (NSC) and the Stakeholders Meeting, as well as from the Workshop participants.

#### *Conceptual framework for the 1<sup>st</sup> Workshop (25<sup>th</sup>-26<sup>th</sup> February 2010)*

For the 1<sup>st</sup> Workshop, the proposed conceptual framework (Table 1) was based upon following two assumptions:

1. the role of older people in society: in principle, any older person represents a resource for the society where he/she lives, and only when frailty and dependency overcome, the demand for care and services (i.e. the use of social and economic resources) becomes predominant, thus making individuals mainly resource recipients;
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 FUTURAGE prior to the workshop.

**Table 1: Conceptual framework for discussion during the 1<sup>st</sup> Workshop**

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

Workshop participants were invited not to feel constrained by this framework, and to take into account cross-cutting perspectives and themes such as the following: life course approach, inequalities, gender, and intergenerational solidarity.

*Conceptual framework for the 2<sup>nd</sup> Workshop (8<sup>th</sup>-9<sup>th</sup> July 2010)*

At the time of the 1<sup>st</sup> Workshop, we were conscious that the above matrix was only “one” of the possible solutions, and not necessarily the “best” one (in this regard, useful feedbacks were received).

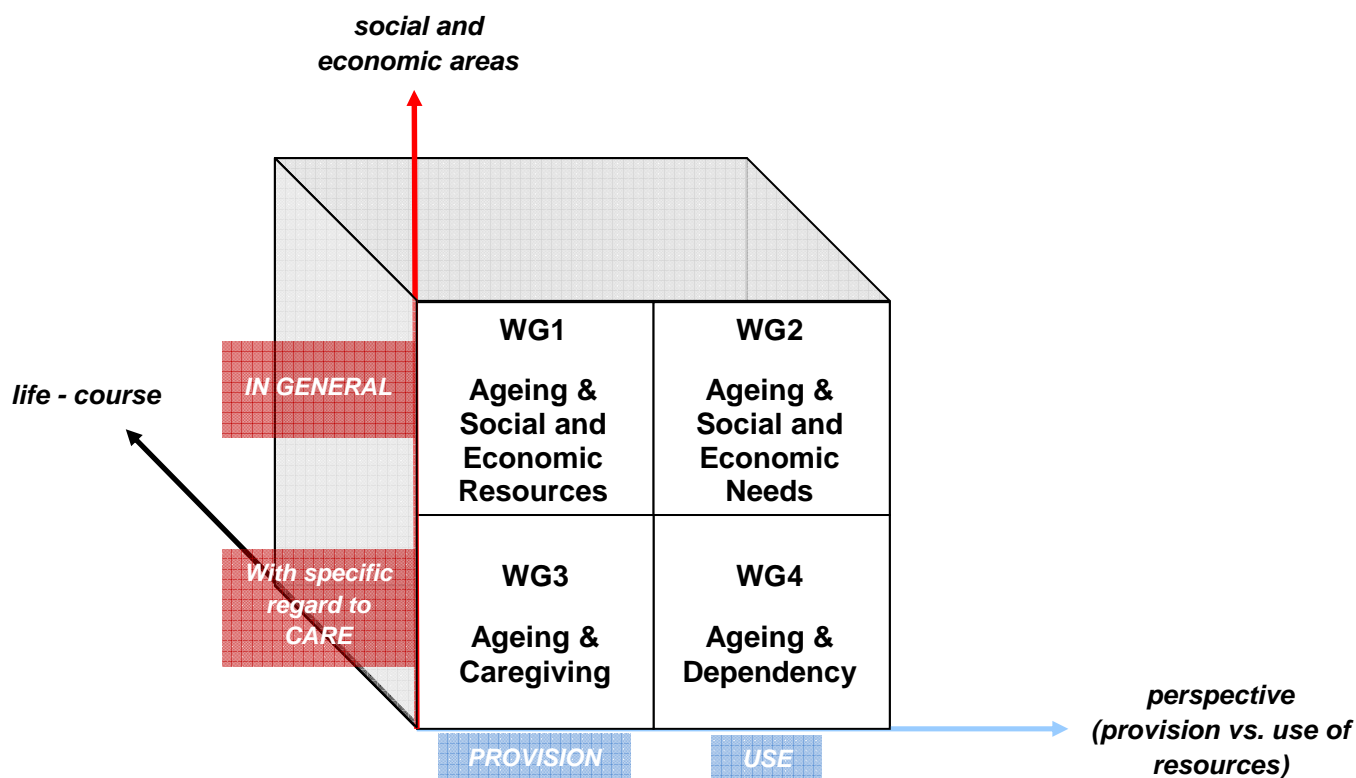
One main limitation was identified in the main focus on “older people”, rather than on the “ageing process”. This might have diverted the attention from other, broader societal and life-course based perspectives.

Therefore, we tried to improve the framework by incorporating the life-course approach, so that the two-dimension *matrix* turned into a three-dimension *cube* (Figure 1), and the rather “static” term “older people” was substituted by the more dynamic and process-related term “ageing” .

Finally, the order of the working groups has been changed, to consider “Care” as only one of all possible areas (although a relevant one).

Even after these adjustments, the proposed conceptual framework might not be able to capture many relevant, especially cross-cutting issues, and therefore we planned to ask participants to provide an explicit feedback also in this regard.

**Figure 1: Updated conceptual framework for discussion during the 2<sup>nd</sup> Workshop**



## **2.2 The Questionnaire on ageing priorities**

The report of the 1<sup>st</sup> Workshop summarized a broad and heterogeneous list of research topics and issues: it was, in fact, the result of a mainly brainstorming discussion. To facilitate the work of participants to the 2<sup>nd</sup> Workshop, the WP3 coordination team elaborated an instrument to be used both before and during the Workshop: a questionnaire that contained a list of 99 items, grouped into the following main sections:

- research topics (including cross-cutting themes);
- methodological issues;
- infrastructure and transferability issues.

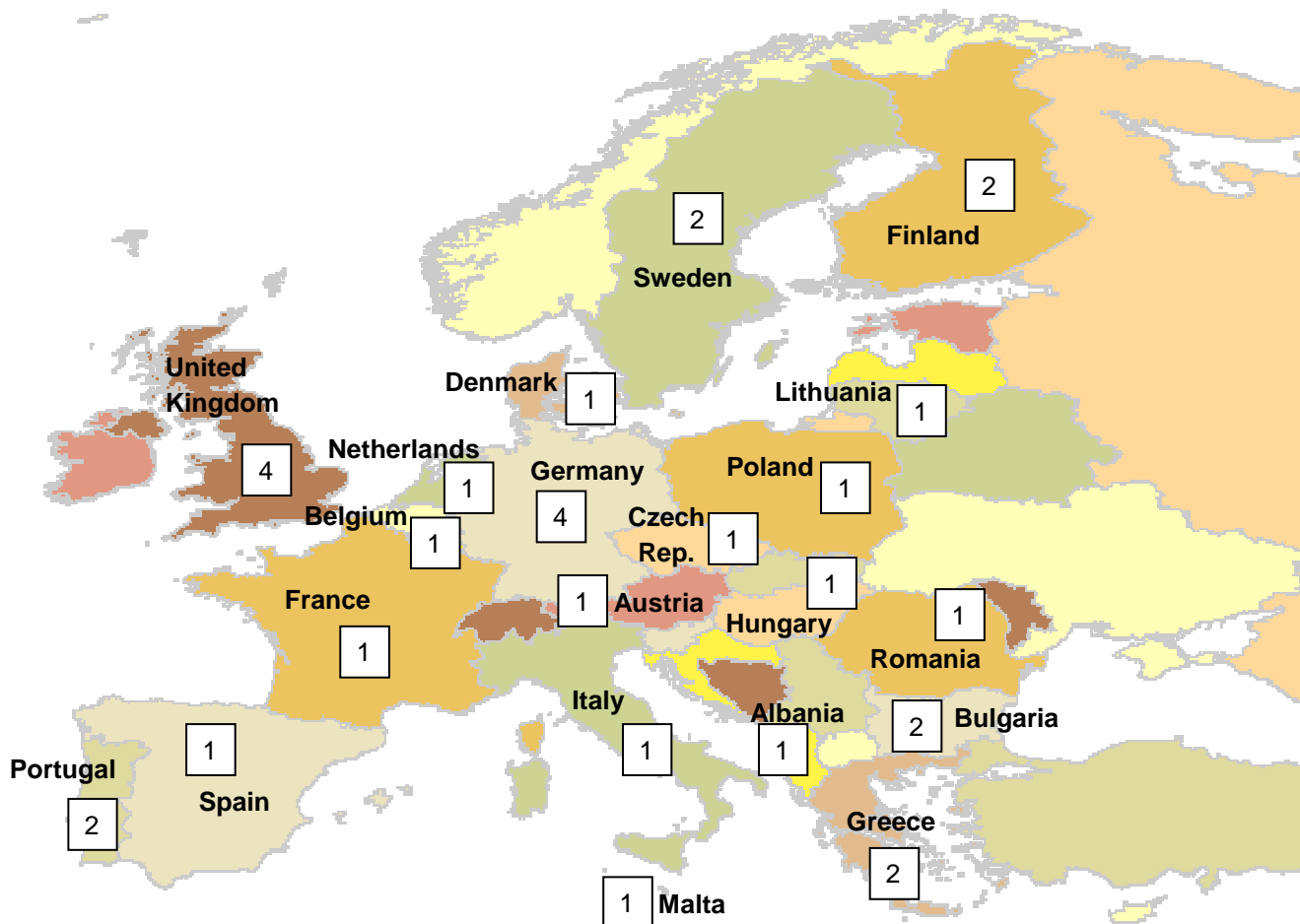
This list of items provided an overview of the most relevant issues in the ageing field, as identified during the WP3 consultation process by both internal and external FUTURAGE sources. Besides the already mentioned FUTURAGE bodies (the Council of Scientists, the Network Steering Committee and the Stakeholders Meetings), other relevant sources which have been consulted to integrate this list are represented by the outcomes of international initiatives such as the *European Research Priorities in the Field of Ageing* (identified by the European Forum on Population Ageing Research), the *Research Agenda on Ageing for the 21<sup>st</sup> Century – 2007 update* (achieved within the efforts undertaken for the Madrid Implementation Plan of Action on Ageing: MIPAA), and the *Strategic Directions for Research on Ageing* (as adopted by the U.S. National Institute of Ageing: NIA).

Workshop participants were asked to rate the relevance of each item. Returned questionnaires were analyzed and a first prioritization of results was achieved and distributed to participants at the beginning of the Workshop, serving as a basis for the discussion during the meeting, in particular for the break-out sessions. The results of the consultation and other details on the methodology used are available in Annex 3.

## **2.3 Participants to the Workshop**

After the 1<sup>st</sup> Workshop, the WP3 coordination team tried to achieve two goals in organizing the 2<sup>nd</sup> one: maintaining the a good level of continuity between the attendance of scientists from the 1<sup>st</sup> Workshop and achieving an acceptable “representativeness” of participants in terms of nationality, discipline and career stage (i.e. junior, mid-career and senior researchers). Results were quite satisfactory, in particular for what concerned nationality: the main goal was to represent equally all European regions (Mediterranean, Western and Eastern Europe, as well as Scandinavia).

**Figure 2: Number of participants to the workshop by nationality**



As Figure 2 shows, 33 scientists coming from 21 European countries plus 1 scientist from outside Europe (Israel) attended the Workshop (3 were representatives of FUTURAGE WP4 and WP6). The gender balance was 20 females vs. 13 males. In addition, 7 members of the FUTURAGE coordination team and 8 researchers from INRCA participated to the Workshop. Overall, the participants were 48 (see Annex 1 for the detailed list of participants).

The coordination team assigned to Workshop participants some specific tasks in order to optimize time and resources, as detailed in Table 2 below.

**Table 2: Tasks of the participants to the Workshop**

When	Who	What
<i>Prior to the meeting</i>	All participants	<ul style="list-style-type: none"> <li>- reading in advance three documents with background information attached to this same e-mail, i.e. a letter from the Director of FUTURAGE, the report from the 1<sup>st</sup> Workshop and the conceptual framework;</li> <li>- filling in and send back by June 25<sup>th</sup> both the “Questionnaire on ageing research priorities”</li> </ul>
<i>During the meeting</i>	All participants	<ul style="list-style-type: none"> <li>- contributing to the discussion both in the plenary and especially in the WGs, taking into account, besides the material indicated above, also the following inputs:               <ul style="list-style-type: none"> <li>• the summary of the answers indicated to the “Questionnaire on ageing research priorities”, which will be presented to you at the beginning of the workshop itself;</li> <li>• the presentations provided by the key-note speakers;</li> <li>• the “key issues for discussion in the working groups”;</li> </ul> </li> </ul>
	Chairs	<ul style="list-style-type: none"> <li>- coordinating the discussion during the three WG sessions, considering our suggestion to focus: in the first session, on revising the topics related your own WG; in the second session, on the topics concerning the other 3 WGs; in the last session, on the overall conceptual framework, the methodological and infrastructure/transferability issues (leaving enough time also to help the Rapporteur to finalise the feed-back to be reported to the final plenary);</li> </ul>
	Rapporteurs	<ul style="list-style-type: none"> <li>- supporting the Chair, by taking notes during the session, and ensuring that all inputs are received. In this task the rapporteur will operate jointly with a member of the local FUTURAGE team.</li> </ul>
	Both Chairs and Rapporteurs	<ul style="list-style-type: none"> <li>- presenting the summary of the discussion of own WG during the final plenary session of the Workshop.</li> </ul>
<i>After the meeting</i>	All participants	<ul style="list-style-type: none"> <li>- by the end of July, amend and integrate the output emerged from the Workshop, under the coordination of the Chair of the WG;</li> </ul>
	Both Chairs and Rapporteurs	<ul style="list-style-type: none"> <li>- by the end of July, receive and collect by e-mail further suggestions coming from participants to integrate and/or amend the ideas raised during the WG discussion.</li> </ul>

## **2.4 The plenary and WG sessions**

The WP3 coordination team designed the Workshop timetable using an approach similar to the 1<sup>st</sup> Workshop, i.e. alternating plenary and WG sessions (see annex 2 for the detailed programme).

The aims of the plenary session were: 1) to get new participants familiar with FUTURAGE project’s objectives and philosophy; 2) to provide insights on the ageing research priorities from the users’ and economists’ perspectives, which were not sufficiently considered during the 1<sup>st</sup> Workshop; 2) to approach critically the revision of the 1<sup>st</sup> report.

After the first plenary, participants were assigned to WGs in accordance with their preferences. The WGs were individuated, according to the conceptual framework, along these four main thematic areas:

- WG1: Ageing & Social and Economic Resources;
- WG2: Ageing & Social and Economic Needs;
- WG3: Ageing & Caregiving;
- WG4: Ageing & Dependency.

For each WG, a Chair and a Rapporteur were designated, who reported to the plenary the main results of their own WG discussions. After the four presentations, speakers received feedbacks from the plenary, which they incorporated in their notes.

The discussion within the WGs was stimulated by a set of key questions circulated in advance and common to all FUTURAGE WPs, with the aim to identify relevant issues in ageing research.

As the Road Map for ageing research in Europe will ideally be both a technical document (setting *the research priorities*) and a political one (stating *why ageing research is so critical*), during the Workshop we needed to address both following aspects:

- a) which topics and issues research should be focused upon;
- b) the reasons why these deserve more attention.

In order to catch both these aspects, we proposed the following key issues for discussion in the WG sessions:

- 1) **Anything missing?** Are there any topics or issues which you feel are still missing among those already listed? Why are these issues relevant? Some of the feed-backs received so far suggested for instance the following: role of drugs in the ageing process; end of life/palliative care; voice of older people; mental health.
- 2) **Any redundancies?** Are there any redundancies which you feel should be removed from the listed topics and issues?
- 3) **Improved structure and/or terminology:** Do listed topics and issues need to be reorganized and/or reformulated, to better take into consideration aspects such as, for instance, the life-course perspective and gender inequalities?
- 4) **European focus:** What is the distinct European focus of this Road Map, compared to other guidelines emerged in other (extra-European or global) contexts?
- 5) **Transferability:** What guidelines should policy makers and funders follow to maximise the effectiveness and impact of ageing research in Europe?
- 6) **Infrastructure:** What additional resources are needed to enable us to focus on the key themes?

In order to facilitate both the discussion and the production of useful outputs, we provided an overview of the main goals of the three WG sessions, the key issues at stakes, and the documents to keep in mind to provide a proper feedback (see Table 3).

**Table 3: Main goals, key issues and relevant documents for each WG session**

WG session	Main goals	Key issues	Relevant documents
Session I – day 1 (11:30-13:00)	revision of topics related to own WG	1) <b>Missing?</b> Are there any topics still missing among those already listed? 2) <b>Redundancies?</b> Are there any redundancies which should be removed from the listed topics? 3) <b>Improved structure/terminology?</b> Do listed topics need to be reorganized (for instance, into few sub-dimensions) and/or reformulated? 4) <b>Priorities?</b> What are the three most relevant items/areas to be considered for the future Road Map? And why (for instance, because they have been neglected so far)?	- Questionnaire - Report from 1 <sup>st</sup> Scientific Workshop - Guidelines for participants/chairs/rapporteurs
Session II – day 1 (15:10-17:00)	revision of other WGs' topics and of cross-cutting themes	1) <b>Missing?</b> Are there any topics still missing among those already listed? 2) <b>Redundancies?</b> Are there any redundancies which should be removed from the listed topics?	same as above
Session III – day 2 (9:00-10:30)	revision of methodology & infrastructure-transferability issues; of conceptual framework; and finalising feed-back	1) <b>Missing?</b> Are there any topics still missing among those already listed? 2) <b>Redundancies?</b> Are there any redundancies which should be removed from the listed topics? 3) <b>Overall framework?</b> Does the proposed conceptual framework (the “cube”) need to be revised and further improved? How? 4) <b>Finalising issues:</b> plan enough time to finalise issues to be reported to final plenary.	same as above plus “conceptual framework”

## 2.5 After the Workshop

Another duty of Chairs and Rapporteurs was to draft a summary of WG discussions within the two weeks following the Workshop. Each draft was circulated among the WG participants, who gave their feedbacks to integrate the documents within the given deadline. In addition, both plenary and WG sessions 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 16<sup>th</sup> August, the WP3 coordination team received all the four WG summaries.

The elaboration of the summaries was made according to a specific procedure. The WP3 coordination team: 1) first considered the revisions that each WG proposed for their own topics; 2) then applied, when possible, the revisions that each WG suggested for other

groups, changing the topic lists; 3) reviewed the cross-cutting issues, and the sections on methodology, infrastructures and transferability of research.

At last, in the discussion section, a provisional attempt to consider also those general remarks regarding the overall Workshop structure has been made.

## **2.6 Expert Meeting**

After completing a first draft report from the 2<sup>nd</sup> Workshop, the WP3 coordination team organized an Expert Meeting that was held in London on 22<sup>nd</sup>-23<sup>rd</sup> September 2010. The aim of this Meeting was to integrate new suggestions and remarks to summarize the output of the Workshop into a well-defined list of priorities for ageing research in the field of Social & Economic Resources. The discussion mainly focused on the methodology, infrastructure and transferability issues and on the overarching issues stemming from the suggestions made by the WGs.

This third stage of the WP3 consultation process was attended by 7 international experts (4 of them participated to previous WP3 Workshops) and 4 members of the coordination team (see Annex 1 for the detailed list of participants).

After the Meeting, the integrated report was sent to both Workshop and Expert Meeting participants for a final feedback.

### 3. Results

#### 3.1 Research priorities by single Working Group

Each WG discussed on a specific area in order to define the research priorities to be included into the Road Map. The four areas were identified on the basis of the Workshop conceptual framework (see Chapter 2): 1) *Ageing & Social and Economic Resources*; 2) *Ageing & Social and Economic Needs*; 3) *Ageing & Caregiving*; 4) *Ageing & Dependency*. Moreover, a fifth section is included in this paragraph: it concerns the *cross-cutting issues*, to be intended as research perspectives that do not fall into a single area, but may be used transversely.

#### **WG1 on “Ageing & Social and Economic Resources”**

The discussion within this group led the participants to review topics from the 1<sup>st</sup> Workshop and to add new ones, mostly concerning the economic perspective that was considered to be under investigated. According to the WG1 suggestions, the future European Road Map for ageing research should foster research in the following areas:

- A) Prerequisites for activation of older people** as social and economic resources for the society, including:
- Role of factors like supportive environment, Health and capacities, Money and wealth, lifelong learning, and role of media;
  - Barriers and opportunities for the different activities: e.g. infrastructures, legal barriers, age discrimination. Specific attention should be paid to those factors facilitating and hindering older people entrance into the labour market, to the problem of ageism and to the effects of the current financial crisis for older people participation to the workforce.
- B) Activities in the labour market**, including:
- Economic treatment and retirement, productivity of older people, activities in the black and grey market, difference between the private and public sector;
  - Study on the motivations for the activity of older people in the paid labour market, discriminations, and the role of ergonomics of workplace;
  - Older people as owners of business: the role of entrepreneurs in old age.
- C) Volunteering, active citizenship and political participation**, including: research on motivations for volunteering and its relationships with formal labour activities and giving economic value to volunteering. Focus on the heterogeneity of volunteering activities.
- D) Activities in the family**, including: informal caring, grand-parenting, intergenerational relations, partners and sexuality, work-life balance and effect of changing family structures (also in a gendered perspective).

- E) Older people as consumers** of products and services, including: mechanisms of supply and demand in the market segmentation (e.g. silver market); Home ownership: economic value and proceeds from house possession.
- F) Learning and teaching:** peers and intergenerational teaching, the role of Information and Communication Technologies (ICT), evaluation of efficiency and efficacy of lifelong education programmes, financial and functional literacy.
- G) Effects of activation for individuals** (in terms of identity, perception of ageing, family and social relationships, attitudes and expectations among different generations) **and for governments, society, welfare states, and companies.** Research on these topics requires a measurement of all elements of older people's contribution to family and society, therefore, further exploration and categorization of such elements for use in field studies designed to demonstrate their contributions.
- H) Role of public policies** (individual choice vs. policy-driven changes) **and normative expectations** (vs. choices).

### **WG2 on “Ageing & Social and Economic Needs”**

Participants to the 2<sup>nd</sup> WG suggested to group research topics concerning the social and economic needs into four areas: social security, cohesion, inclusion and empowerment. In some cases, the research items overlap across the four groups.

#### **A) Social security**

- Economic needs: income maintenance, pension system, covering long term care, costs of drugs and medication use by older people, consumption patterns over the life course;
- Displacement of and support for older persons in emergency situations, such as man-made and natural disasters;
- Informal economy based income security in old age;
- Multidimensional nature of poverty and its impact on older persons (including age specific poverty indicators);
- Evaluation of existing models of social security and identification of best practice;
- Evaluation of status and sustainability of existing informal and formal support systems;
- Changes in social support systems as a result of social security/pension reform. Implications for individuals, family and society;
- Factors influencing resource allocation and expenditures for older people, and evaluation of its impact, especially relating to poverty reduction and improvement of the health and well-being of older people;
- Pension system reforms to reflect the increased flexibility of the labour market and to take into account the active role played by citizens beyond employment.

**B) Cohesion**

- Cultural needs: religion and spirituality, communication and media utilization;
- Mechanisms for ageing migrants' inclusion in destination countries (incl. family relationships between migrants and their older parents in original countries);
- Changes in social support systems as a result of social security/pension reform – implications for individuals, family and society;
- Factors influencing resource allocation and expenditures for older people, and evaluation of its impact, especially relating to poverty reduction and improvement of the health and well-being of older people.
- Characteristics of an age mature society;
- Preparation for ageing.

**C) Inclusion**

- Social/health needs: social inclusion, representations in media and society, solidarity mechanisms;
- Vulnerability: elder abuse and neglect, living arrangements, lifelong disadvantages
- Images of ageing, ageism and age discrimination in different societies (including the issue of mandatory retirement);
- Mechanisms for ageing migrants' inclusion in destination countries (incl. family relationships between migrants and their older parents in original countries);
- Informal economy based income security in old age;
- Needs of older persons arising from technological change and economic advancement;
- Evaluation of existing models of social security and identification of best practice;
- Evaluation of status and sustainability of existing informal and formal support systems;
- Improving working conditions (age management beyond the reform).

**D) Empowerment**

- Patterns of resource availability to older persons; use and exchange of resources by older persons;
- Needs of older persons arising from technological change and economic advancement;
- Increased opportunities of collaboration between young and senior workers, to improve the transfer of knowledge and skills in the working place;
- Implementation of lifelong learning programmes.

### **WG3 on “Ageing & Caregiving”**

Discussions in this WG session focused on linking priorities at the macro-micro level using the findings from the questionnaire on priorities for research in ageing and caregiving (see Annex 3), as well as under-investigated areas and areas of overlap with other WG topics. This led to a revision of the four main research areas from the 1<sup>st</sup> workshop into five main research areas for ageing and caregiving, which were used to re-classify the priorities from the questionnaire and additional topic arising from the discussion.

#### **A) Relationship between carer and cared-for in the new family setting**

- Relationship between informal caregivers and the formal care system;
- Inter-generational and intra-generational perspectives;
- Content of the care being provided and needs assessment instruments.

#### **B) Changing norms and values in caregiving**

- Relationships between caregiving and the new patterns of solidarity and individualism;
- The conceptualisation of quality of care: differences between caregivers (informal and formal) and care recipients;
- Preferences and obligations of older people involved in informal caregiving.

#### **C) Rewards and costs of caregiving**

- Rewards and costs of caring: social and economic perspectives;
- Carers resources: time, functional abilities, knowledge and health;
- Balancing care and paid employment;
- Education and training;
- Barriers and opportunities.

#### **D) Care arrangements in a cultural, gender, cohort and life-course perspectives**

- Impact of migration on care;
- Home, community and institutional care;
- Women and men as caregivers;
- Younger caregivers;
- Technological support;
- Urban/rural settings;
- Public/private/NGO/informal care mix;
- New patterns of volunteering in the care sector.

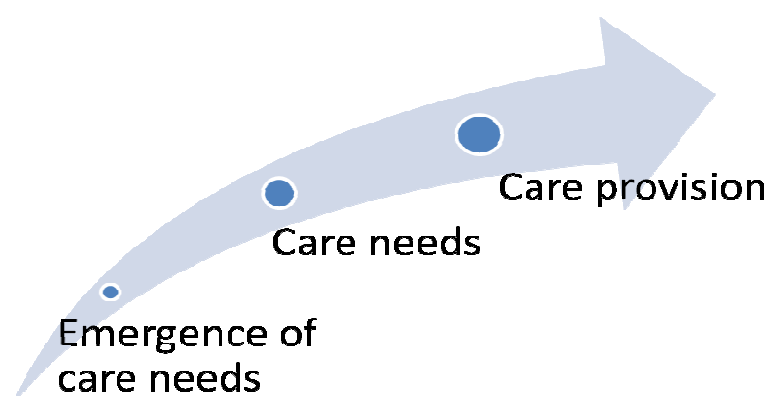
#### **E) Policies**

- Policies and incentives for involving older people in informal caregiving also beyond family settings – new forms of volunteering;
- Care policies: legislation, cash for care schemes and services to support carers;
- Care regimes.

### WG4 on “Ageing & Dependency”

The WG4 agreed on reorganizing the structure of the listed topics by: grouping them into sub-dimensions that clarify the overall rationale of the research topic of ageing and dependency; eliminating some topics that were felt redundant and/or overlapping with others; adding some topics that lacked clear expression in the previous list. To group the topic related to the area of care, the process in Figure 3 was followed by WG participants.

**Figure 3: From emergence of care need to care provision**



The WG4 suggested the WG3 on “Ageing & Caregiving” to use the same approach to list their items, and also to merge at the end of the Workshop the two different WGs which were felt to be too interconnected to be considered separately.

The revised research topics proposed by this Working Group are the following:

- A) Terminology:** the need to agree to increase investments to harmonize concepts and measurements to define the issues at stake, given the variability of care systems in different cultures and settings.
- B) Emergence of care needs:** all research topics related to the emergence of limitations to functional/cognitive autonomy (that on turn trigger the need for care, see following points):
  - Health related limitations to functional autonomy;
  - Socio-economic conditions causing limitations to functional autonomy;
  - Understandings of autonomy / loss of autonomy in different settings and at the individual level;
  - Identification of risk factors and of suitable prevention strategies.
- C) Assessment of care needs:** all research topics that identify the care needs that emerge in sequence of what was outlined in the previous point. The assessment of these care needs can refer both to the care recipients and to the caregivers. Improvement of methods to measure disability, that enable valid comparisons across time and place and between social groups are also required.

- D) Dimensions of care:** all research topics that capture the different aspects/implications/dimensions of care-giving and care-receiving, following the main principle of keeping the ageing individual in the centre of the care process:
- Cross-cutting dimensions:
    1. *Formal and informal care;*
    2. *Public and private care;*
    3. *Health and social care: integrating care and the care continuum model;*
    4. *Type of care provision: in-kind (home or residential care services) and cash-for-care (or a mix of the two);*
  - Instruments of care provision:
    1. *Human resources: recruitment and training needs;*
    2. *The use of ICT;*
    3. *Funding;*
  - Evaluation of care:
    1. *quality assessment;*
    2. *optimization & effectiveness of care;*
    3. *accessibility;*
    4. *equity;*
    5. *sustainability.*

### **Cross-cutting issues**

The discussion within WGs also concerned cross-cutting issues, already emerged from the outputs of the 1<sup>st</sup> Workshop (see Annex 3). These are broader research areas which, according to Workshop participants, deserve specific attention, and which cannot be constrained to a single WG.

The following issues have been summarized from the output summaries of WG debates and integrated with the feedback of the Expert Meeting:

- Gender and ageing;
- Ageing among minorities and different ethnic groups;
- Human rights assurance;
- Inequalities and diversity in the ageing process (including differences among socio-economic classes);
- Ageing in different settings: national, regional, institutional and community;
- Impact of globalisation on ageing;
- Age discrimination and ageism;
- Ageing and culture.

### **3.2 Methodology, infrastructure and transferability issues**

During the third working session, each WG discussed separately about methodological issues in ageing research, proposing a series of amendments to the items identified in the 1<sup>st</sup> Workshop and providing additional inputs in this area. The scientists participating in the Expert Meeting suggested further integrations and modifications, which have been summarized and incorporated in the text.

A main, general suggestion advanced by the WG4 and incorporated in the report was to merge, within the Road Map, the issues of methodology, infrastructure and transferability. This was not aimed at responding to some sort of formatting convenience, but rather anchored in the conceptual and practical intersections that characterize these three broad domains. The list of suggestions emerging from the above process can be summarised as follows.

#### *Methods and study design*

- Expand the use of longitudinal studies, follow up studies, cohort studies and experimental studies.
- Improve methods for evaluation of cost-effective interventions (including randomized trial studies), including indicators to measure the impact of undertaken initiatives.
- Combine insights from qualitative and quantitative methodologies, also by sharing definition of mixed methodologies, description and interpretation (triangulation).
- Further develop specific methods and new approaches of collecting data to deal with the variety of upcoming social constellations in ageing societies, such as social network analysis, time use studies, risk maps and adapting existing methods/approaches to ageing research.
- Increase meaningful and effective participation and involvement of older people and other Stakeholders in research. Need to be aware of levels of understanding of very frail older people. There is also need to develop new methods for “extracting” older people’s knowledge during the research, as frail older people are a theoretically rich source of information. In any case, it is important to involve in research also the very frail and marginalized OP, usually underrepresented in large surveys.
- Give value to existing data (including consolidation of information from multiple sources. Establishment of linkages between databases).
- Invest more on the issues concerning the comparability of researches and data.

#### *Coordination and collaboration in ageing research*

- Coordination and collaboration constitute a crucial point for future ageing research: a lack of coordination both among EU Member States and EU-funded projects puts European countries at a disadvantage comparing to other world regions (e.g. the U.S.). In order to implement coordination and collaboration, there is need to involve more adequately new Member States, EU underrepresented areas (Southern and Central Europe), and non-European countries.

- To this purpose, the model of a “permanent forum” (to be intended as a “network”, rather than a centralised “European Institute on Ageing”) has been advocated, with a clear preference for an orientation towards an exclusively 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 more intensive research work. In order to evaluate ongoing research and to support the design of further research projects, the establishment of an EU-based “clearing house” has been suggested, too, while the training of young scientists in the area of gerontology should represent a more systematic objective of coordinating agencies at the European level (see also discussion in the report from the 1<sup>st</sup> Scientific Workshop).
- Develop a common European research agenda which could facilitate the advocacy of national focuses.
- Promote the capacity of the countries where ageing research is developing, in particular in Southern, Central and Eastern Europe.
- Improve coordination of current ageing research by linking better different research projects, strengthening systematic literature reviews and mapping existing research projects by relevant issues.
- Implement a focal point which can be consulted for methodological issues like statistical work, comparative research, survey design and institutional design in different EU countries, concepts and terminology in the field of ageing.

#### *Multidisciplinary*

- Invest more into multidisciplinary research (including the education of multidisciplinary persons and researchers), also involving experts from other fields, increasing general awareness and training. Multidisciplinary research should be recognized as particularly valuable for influencing policy and practice, although not all topics might benefit to the same extent from this approach.
- Recognize the fact that some disciplines are often underrepresented in ageing research (e.g. anthropology of ageing).
- Invest more in theoretical research and in common definitions to facilitate multidisciplinary knowledge in ageing.

#### *Transferability of ageing research*

- Improve the transferability of ageing research into policies (also making available specific funding for research transfer), taking into account both blue-sky research (whose results could be presented to policymakers as recommendations) and policy-driven investigations (responding to research questions directly addressed by policymakers).
- Promote systematic and timely dissemination of research findings to policy makers, practitioners and the broader public, also by using appropriate means to communicate and share best practices.

- Focus part of research efforts also on the discrepancies existing between scientific knowledge and its implementation in policy and practise.

#### *Evaluation of ageing research*

- Promote the systematic planning of an evaluation phase of the results reached by research, to facilitate both their transferability and the possible implementation of follow up studies.
- Sustain the development and use of indicators to measure the impact of research projects and political interventions on society.

#### *Funding*

- Develop specific “follow-on funds” to support successful projects.
- Especially in countries where English still represents a linguistic barrier, specific funds should be provided for a more timely translation of the findings reached by national research, in order to facilitate their accessibility to the international audience. At the same time, appropriate funding should be made available to promote the translation into national languages of research findings published in English, in order to facilitate a wider exchange and transfer of scientific knowledge and experiences.

#### *Capacity building*

- Educate the new generation of ageing researchers, also by recognizing the importance of researchers’ mobility among institutions.
- Implement the chances to get joint degrees, grants and programmes for doctoral students and post-doc researchers across and beyond European educational systems.

#### *Data accessibility*

- Promote the review of current data sources across countries and topics in order to identify existing knowledge gaps.
- Develop repositories of previously EU-funded research projects on ageing as well as of most relevant ones funded by other institutions.
- Strengthen the availability of adequate baseline data on health status, well-being, and socio-economic situation of older people.
- Make population census data available for research in all European countries (and harmonize them).
- Further develop and make accessible age-specific socio-economic indicators and gender socio-economic indicators in different EU countries.

## 4. Discussion and summary of key overarching issues

### 4.1 General remarks from WGs and Expert Meeting

Although having received common guidelines, the four WGs were free to approach autonomously their work. This is clearly reflected by the different ways of organising and presenting the results of the WG discussion at the end of the workshop. All WGs had however analysed and revised with great attention the results from the 1<sup>st</sup> meeting and added important new insights to be considered by the Road Map.

In particular, participants discussed on the general conceptual framework for the Theme of Social & Economic Resources, with different proposals on how to improve it (see Annex 4 for more details).

Moreover, we received useful feedbacks also from the following Expert Meeting, in which the invited scientists made remarks on all the issues dealt with during the Workshop (topics; cross-cutting issues; methodology, infrastructure and transferability issues; conceptual framework; final Road Map). The coordination team integrated their proposals into the following paragraphs, as well as in the previous ones (see Par. 3.1 and 3.2).

Other general remarks included:

- The difficulty of maintaining the division of topics (as proposed to the different WGs), since many research topics are interconnected and cross the boundaries of a single WG (and in many cases also of single disciplines, and of a single FUTURAGE Workstream);
- The emphasis on care was still perceived as too strong. There was general consensus that care should be considered only as a simple sub-dimension, on the same level of other issues, such as for instance work and family;
- Some participants underlined the need to stress further the economic perspective;
- The research priorities are still too much focused on older people rather than on the ageing process: research priorities should take into account both causes and effects of ageing during the life-course;
- The conceptual framework needs to be integrated not only with the ageing perspective, but also by including the cohort perspective. By considering the cohort approach, it is possible to better understand how different generations are going to face the ageing process in the medium/long-term;
- At that moment, the research priorities identified by WGs were too detailed for the target audience who is supposed to read and use the Road Map (policymakers at EU level);
- The discussion was mainly focused on research topics but not on research gaps. A stronger consideration of the latter might be useful to define final priorities for the Road Map. A further problem recognised by scientists involved in the meetings is that in defining research priorities a possible “selection bias” could occur, as researchers may tend to consider as most relevant those topics on which they are working on;

- Methodology, infrastructure and transferability issues are becoming more and more important in the field of Social & Economic Resources because of the global financial crisis and its impact on societies.

#### **4.2 Reorganization of priorities in research areas**

Previous research priorities (see Chapter 3) were built on the results of WGs and plenary discussions: however, they might be too specific to be included as they are in the Road Map for ageing research.

In order to extract the final research priorities concerning the field of Social & Economic Resources, the WP3 coordination team identified, as a first attempt to summarize findings, ten research areas in which all topics emerged during the discussion (WGs, plenary and expert meeting) can fall within. In approaching this task, we draw on suggestions made by WG2 of considering the trichotomy ageing/aged/age and the possible interaction between these categories and social institutions (see Annex 4 for details).

We also incorporated the transferability issues by identifying examples of policy questions which are connected directly to each research field, and are likely to have a relevant weight in social and economic policies in the next future.

**1. Ageing and Social Participation.** This research area includes investigations on how volunteering, civic society and politics are changing in an ageing society.

In addition, the prerequisites for an active participation in such activities along the life course need to be clarified, considering the role of factors like health, wealth, education, capacities, physical environments, media, legal aspects, and age discrimination. Research on volunteering, active citizenship and political participation should pay attention to the issue of motivations and to the relations between these forms of participation and other engagements in the labour market and in the family. In this regard, it is important to recognise the heterogeneity existing among the different volunteer activities. The issue of motivation is closely connected to that of individual choices and policy-driven changes, and of normative expectations vs. choices.

Future research should furthermore clarify the effects of activation for individuals, in terms of identity, perception of ageing, family and social relationships, attitudes and expectations among different generations (e.g. new patterns of intergenerational relations and solidarity). At the same time, it should reveal the consequences of social participation for governments, society, welfare states, and companies. This can be achieved also by attributing an economic value to volunteering.

*Examples of policy issues* relevant in this field are how social cohesion can be increased in ageing societies through participation, and how active ageing can be effectively promoted in society.

**2. Ageing and Labour Market.** Research on the impact of ageing on the labour market includes the analysis of the productivity of an ageing workforce, of its economic

remuneration and of available options of retirement trajectories, in connection also with pension system analyses.

A deeper understanding of the motivations underlying the activity in the paid labour market has also to be achieved, taking into account heterogeneous patterns of participation in the different economy sectors. Research should not be constrained only to comparing public and private sectors, or formal and grey economy, but rather extended to investigate what are the peculiarities of each sector and the consequences for ageing workers.

Moreover, research on factors facilitating and hindering the entrance of ageing workers into the labour market is also required, including issues such as ageism, older workers' deteriorating health (particularly in Eastern Europe), and the impact of ergonomics in the workplace. As in the case of social participation, it is crucial to gain comprehension of the effects of participation in the labour market at micro (for individuals) and meso/macro level (for governments, society, welfare states, and companies), as well as to explore the relations between individual choice and policy-driven changes, and between normative expectations vs. personal choices. In this regard, it would be useful to gain more scientific knowledge about the conditions facilitating entrepreneurship in older age.

The relationships between different generations taking place in the labour market should not be neglected either, in order to increase our understanding of how to overcome the tensions arising between the growing supply of an older workforce and the tendency of companies to usually look for younger workers, as well as of how to promote forms of intergenerational solidarity like mentoring and intergenerational transfer of know-how.

*Examples of policy issues* relevant in this field are how to promote employment opportunities in ageing societies and prevent age discrimination in the labour market.

**3. Ageing, Families and Generations.** This research area focuses on the study of the activities of the ageing individuals within the family settings (caring, grand-parenting, sexuality, etc.), also in a gendered perspective, considering how ageing and family relations (marriage, divorce and cohabitation), value system and moral obligations are changing. A relevant issue is also that of understanding how these changes influence in turn the family response to the care needs of dependent family members, and the role played in this by intra- and intergenerational relations (including financial transfers and other forms of non-monetary solidarity).

Furthermore, given the strong migration trends currently affecting Europe, it will be increasingly important to investigate the patterns and impact of transnational family relations, including the analysis of the different social policies involved by this issue.

*Examples of policy issues* relevant in this field are the societal needs raised by changing family structures, the range of resources available to them, and their role in the public space. A crucial contribution is in this respect provided also by the analysis of the extent to which intergenerational solidarity can foster social cohesion.

**4. Ageing and Education.** Changing demographic structures bring the need for further research on learning and teaching in older age. How can formal and informal education systems face the changing needs of the ageing population, for instance regarding financial and functional literacy, use of technologies and development of new skills in older age? Research should better elucidate what can be the role of peer education, of ageing individuals as trainers, and of intergenerational teaching.

In addition, the speed and extent of the ageing process urges for revisiting in-depth the traditional roles of social actors in the provision of educational interventions and for devising innovative solutions in the educational system in a lifelong learning perspective.

Clarifying what the role of ICT will be in this area represents a challenge for research, along with the need to make more efforts in the evaluation of efficiency and efficacy of existing lifelong education programmes.

*Examples of policy issues* relevant in this field are the development of appropriate lifelong learning programmes and education for all ages, and the adaptation of the formal education system to the changing needs of an ageing population.

**5. Ageing and Consumption.** The share of older consumers of products and services is increasingly larger, so that research should focus on how consumption and saving patterns change along the life course, identifying which mechanisms rule the supply and demand in the “silver” market. Both the perspective of the companies and that of consumers should be considered and compared, in order to better understand to which extent the power-balance between the two actors in this market might run the risk of becoming asymmetrical or not over time. Issues related to housing fall within this area, too, including for instance the need to forecast the future impact of population ageing on the real estate market.

*Examples of policy issues* relevant in this field are the question whether specific protection programmes are needed to safeguard the rights of older participants in the “silver market” or, on the other hand, whether more supports are required to promote the adaptation of products and services to the needs of ageing consumers in semi-markets (i.e. where the match between demand and supply is not ruled by the free market alone). Another crucial policy issue concern the role played by the recent international financial crisis on consumption in the relevant market segments.

**6. Ageing and Welfare.** Formal and informal welfare are also subject to change as a consequence of economic, social, and cultural trends.

One of the most urgent challenges for research in this area is certainly represented by the analysis of the sustainability of existing informal and formal support systems (the latter being identified as those providing services or financial transfers to users, e.g. in form of pensions, health, social or long-term care).

This analysis could also be aimed at identifying good practices, and at evaluating the impact of recent and forthcoming welfare reforms on individuals, families and society.

Other important issues related to the needs of the ageing population are income security and the housing issue.

The integration and coordination of family carers and of private care workers within the formal support system is also an increasingly important topic, as the role of these providers is becoming more evident also in those countries where traditionally the care for dependent individuals was a responsibility of the State. Therefore, the role of services in supporting informal carers with their task is fundamental to prevent them from stressful situations and burn-out.

A deeper knowledge of emerging vulnerability issues is also required to develop effective and efficient interventions, as in the case of elder abuse and neglect and in dealing with the effects of lifelong disadvantages - such as for instance poverty or social exclusion - in specific population groups, e.g. those with an ethnic or migrant minority background.

*Examples of policy issues* relevant in this field can be identified, at a macro level, in the need to guarantee the sustainability of the welfare systems and, at a micro level, in the aim of protecting ageing individuals from new forms of vulnerability and abuse.

- 7. Ageing and Spirituality.** Most European societies are characterised by an increasing tendency to neglect issues related to the role of pain and death, but also to the spiritual dimension in general. Some empirical evidence seems however to show that spirituality might represent a relevant support in older age, especially in case of long-term care needs. It is therefore increasingly important to uncover the role of spiritual needs and resources along the life-course, to be investigated both in their religious and non-religious facets, including values, attitudes and behaviours influenced by society and cultural background.

*Examples of policy issues* relevant in this field are the need to understand how spirituality can affect social cohesion and intergenerational relationships, as well as its role in promoting or hindering an active contribution of the ageing individual in the different societal sectors (labour market, civic participation, informal care etc.).

- 8. Ageing and Technologies.** Research in this area should consider both the role of ICT in responding to social, health and cultural needs in ageing societies and the needs arising from technological change itself, e.g. the consequences of the digital divide. Given the increasing role of new technologies in everyday life, multidisciplinary investigations in this field appear urgently needed, especially on the impact deriving from the use of new forms of communication and media, on the causes of exclusion from a proper use of ICT, and on the social and economic dimensions of this use in general.

Furthermore, the role of assistive technologies in improving everyday life (including contributions from ergonomics and engineering) should be deepened, as well as the issue of housing adaptation to tackle dependency-related needs (including contributions from domotics).

*Examples of policy issues* relevant in this field include the need to understand how to reduce or even prevent the digital divide in the use of new technologies, especially in those fields, like long-term care, in which they might represent a crucial support tool for both formal and informal care providers.

**9. Ageing and Migration.** The phenomenon of migration towards ageing European societies, both within and from outside the EU, raises several challenges for research and policies. These might relate, in the first place, to the role of migrants in the care sector (both in the formal and informal sector, also in relation to the hidden economy), where it would be urgent to estimate their impact through appropriate cost-benefit analyses, which should include also the impact in terms of care drain on the countries of origin.

More attention should be paid also to the mechanisms facilitating the integration of ageing migrants in destination countries, by analysing the impact of migration trajectories over the individual life course and on society itself, on the background of local cultural and societal mediators.

A further area of interest is that of transnational families, with a more specific focus on the relationships between the migrants and their left-behind kin in the countries of origin.

*Examples of policy issues* relevant in this field are the promotion of positive interethnic relationships in the migrants' countries of destination, the prevention of care drain effects in their countries of origin, and a better understanding of the how migration can contribute to and profit from the ageing of our society.

**10. Ageing and Leisure.** In the last decades, and despite the recent financial crisis, significant population strata of most European societies – especially in the Western ones - have been experiencing good health and a wealth level which gives them the possibility to choose among a large variety of options to spend their free time during retirement and generally in older age (e.g. travelling, cultural events, wellness and sport initiatives etc.).

This situation implies the possible opening of new opportunities in several economic and social areas, such as for instance for companies providing leisure-based products and services, but also in terms of the development of diverse non-material needs and life-style choices reflecting the consumers' value system, social representations and cultural background. These represent all aspects on which more focused research is urgently needed.

*Examples of policy issues* relevant in this field concern, among other things, a better understanding of the social implications of mass leisure activities in older age, such as for instance the possible competition existing between older people's choice to spend time in new forms of leisure, rather than taking care of grandchildren.

## **5. Towards the Road Map: suggestions and remarks**

During the consultation process, involved participants were asked to indicate how the final Road Map should look like. In this regard, WP3 coordination team collected a series of suggestions, concerning both formal and content aspects, that have been summarised in the following paragraphs.

### **5.1. Target audience**

- The main target of the Road Map should be policymakers at the EU level, in particular DGs, and this mean that it should convey a clear top-level message. The document is not addressed primarily to the scientific community, nor to the public, therefore has to use a clear language, avoiding unnecessary technical and scientific references that may be not adequate to the addressees of the Road Map.
- Another possible target audience is represented by the private sector, i.e. companies and private institutions that could be interested in collaborating on ageing research by financing programmes or acknowledging research results.
- As secondary targets, both scientific community and population in general might be stimulated by the Road Map, in recognizing and rethinking the crucial points in ageing research.
- The Road Map should be useful also at a country level, especially for national agencies involved in ageing research. It should be stressed the importance to acknowledge the Road Map at this level, especially considering that EU Member States have different levels of experience in this research field.

### **5.2. Structure and content**

- From a formal point of view, the Road Map could be presented as a manifesto, containing some clear and specific points, with a detailed description for each identified priority. The document should not be only a list of topics, but rather clearly present the relevance of the indicated priorities and of their transferability, keeping in mind challenges existing in the short, medium and long term.
- To be accessible to policymakers, in the Road Map the importance of research priorities should be explicit by the description of future social and economic scenarios.
- The Road Map should be Europe-focused and consider the - partially quite strong - differences existing between EU regions. It should emphasize clearly that Europe is not homogenous, not only because of internal structural differences in the social and economic systems, but also because current ageing research is heavily concentrated in North-Western Europe. While taking into account the global state-of-the-art in ageing research of each region, the document should consider and specifically refer to the particular needs of each region, and not remain at a general EU level only.
- Although all priorities identified so far are important, some of them have been more frequently stressed during the consultation. These refer to the “burning issues” listed in

Table 4 and were agreed by scientists from different disciplinary background and country of origin.

**Table 4: “Burning” issues in ageing research**

- Sustainability of welfare systems:
  - Pension system;
  - Support to frail elderly and their caregivers.
- Migration in ageing Europe:
  - Employment of migrant care workers;
  - Integration of migrants in destination countries.
- Inequalities and diversity in the ageing process:
  - Differences between socio-economic classes;
  - Ageing among minorities and different ethnic groups.
- Age discrimination and ageism.
- Volunteering and social participation.

- It has been suggested that all Workshops participants of the four WPs (approximately 200-250 scientists) should be involved in commenting the draft of the Road Map. This could be done for instance by sending out a draft of the document with a short structured questionnaire of 4-5 questions. This process could provide useful feedbacks to integrate the document.
- In order to make the Road Map effective also at a national level and to enhance collaborations among countries, the document needs to be officially translated in all relevant EU languages, in order to overcome possible linguistic barriers, especially in the new Member States.

### **5.3 Time and revision**

- It could be dangerous to “rigidly plan” the topics which ageing research should deal with over a period as long as 10-15 years. Since things tend to change very quickly (consider for instance the unexpected impact of the recent global financial crisis), it is doubtful, too, that research priorities would be stable during all this period, and a “rigid” Road Map might therefore not be able to forecast research challenges over such a long time frame. This consideration leads to an important consequence: the suggestion that the Road Map should be flexible enough to allow for the needed changes, making research priorities less detailed and susceptible to be modified in the future.
- The Road Map should be considered as a dynamic document that may be changed over time in order to take into account the emergence of new factors and today unpredictable events. To this purpose, an “incremental circular approach” could be used, to periodically monitor the implementation of the Road Map over time and, if necessary, revise it.

## Annex 1. Lists of participants

### 2<sup>nd</sup> Workshop (Ancona, 8<sup>th</sup>-9<sup>th</sup> July 2010)

#### *Invited scientists*

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**Expert Meeting**  
**(London, 22<sup>nd</sup>-23<sup>rd</sup> September 2010)**

***Invited scientists***

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## Annex 2. Programmes

### 2<sup>nd</sup> Workshop (Ancona, 8<sup>th</sup>-9<sup>th</sup> July 2010)

#### DAY 1 (8<sup>th</sup> July)

9:00 Opening plenary: Welcome, introduction & background to the project (40')

- Antonio Aprile, INRCA General Director, and Fabrizia Lattanzio, INRCA Scientific Director  
*Welcome* (10')
- Giovanni Lamura, INRCA  
*Introduction* (10')
- Carlos Chiatti and Francesco Barbabella, INRCA  
*Priorities for Future Ageing Research in Europe: The Results of the Consultation among the Workshop Participants* (15' + 5' for questions)

9:40 Key-note speeches on relevant aspects for ageing research on social and economic resources at a European level (80')

- Elisabeth Mestheneos, President of AGE Platform Europe  
*Ageing Research on Social and Economic Resources: The Perspective of European Research Users* (20')
- Discussion (15')
- Asghar Zaidi, European Centre for Social Welfare Policy and Research  
*Ageing and Fiscal and Pension Sustainability: Present and Future Issues in EU Countries* (20')
- Discussion (15'+10')

11:00 Coffee break (30')

11:30 Working group (WG) session 1: *Revision of topics related to own WG* (90')

Four Working Groups in parallel:

*WG1: Ageing & Social and Economic Resources*

Chair: Zsuzsa Széman, Hungarian Academy of Sciences

Rapporteur: Kathrin Komp, VU University of Amsterdam

*WG2: Ageing & Social and Economic Needs*

Chair: Hans-Joachim von Kondratowitz, IAGG - President of Behavioural, Social Science and Research Section

Rapporteur: Lars Andersson, University of Linköping

*WG3: Ageing & Caregiving*

Chair: Hanneli Döhner, University of Hamburg-Eppendorf

Rapporteur: Judith Triantafillou, Hellas 50+

*WG4: Ageing & Dependency*

Chair: Giovanni Lamura, INRCA

Rapporteur: Alexandra Lopes, University of Porto

13:00 Lunch (90')

14:30 Key-notes speech on relevant aspects for ageing research on social and economic resources at a European level (40')

- Hans-Joachim von Kondratowitz, IAGG - President of Behavioural, Social Science and Research Section  
*Optimizing the Road Map for Ageing Research: Suggesting Improvements and Revisions* (20')
- Discussion (20')

15:10 WG session 2: *Suggestions of revision of other WGs' topics* (flexible coffee-break by each WG) (110')

17:00 Briefing with WG Chairs and Rapporteurs only

17:30 End of working session

18:00 Social evening

## **DAY 2 (9<sup>th</sup> July)**

09.00 WG session 3: *Methodology & Infrastructure/Transferability; overall Conceptual Framework; finalising feedback for the plenary* (90')

10.30 Coffee break (30')

11.00 Feedback of WGs to the plenary (120')

- WG1 (10' + 10' discussion)
- WG2 (10' + 10' discussion)
- WG3 (10' + 10' discussion)
- WG4 (10' + 10' discussion)
- Discussion (40')

13.00 Lunch and departure of participants

## **Expert Meeting** **(London, 22<sup>nd</sup>-23<sup>rd</sup> September 2010)**

### **DAY 1 (22<sup>nd</sup> September)**

13:00 Arrival of participants and lunch

13:30 Opening session: Welcome, introduction & background to the project (20')

- Francesco Barbabella, Carlos Chiatti and Giovanni Lamura, INRCA  
*Where do we stand? Toward the Road Map for Ageing Research*

13:50 Working session 1: *Improving the Provisional Report from the 2<sup>nd</sup> Scientific Workshop of the WP3: General Remarks* (70')

15:00 Coffee break (30')

15:30 Working session 2: *Revising the Research Priorities* (90')

17:00 Close of the working day

17:30 Social evening

**DAY 2 (23<sup>rd</sup> September)**

09:00 Working session 3: *Revising the Research Priorities, continued* (75')

10:15 Working session 4: *Methodology, Infrastructure and Transferability Issues* (75')

11:30 Coffee break (15')

11:45 Working session 5: *Next Step: The Development of the Road Map* (75')

13:00 Close of the meeting

13:30 Lunch and departure of participants

## **Annex 3. Results of the pre-Workshop survey on research priorities**

### **Reasons and aims of the questionnaire on research priorities**

After the 1<sup>st</sup> Workshop, as it was planned, we retrieved through a mainly brainstorm-like exercise a broad list of topics grouped into the following sections:

- a. Research topics (including cross-cutting issues);
- b. Methodological issues;
- c. Infrastructure and transferability issues.

Despite of the comprehensiveness of this list, however, we did not have any knowledge about the perceived relevance of these issues among the scientists. All issues were at the same level of relevance. The aim of the 2<sup>nd</sup> Workshop consisted also in prioritising items in order to get closer to the definitive Road Map.

Despite the difficulty in selecting few topics among a list of important ones, the objective of FUTURAGE is to build the definitive Road Map for ageing research in Europe, making a prioritization of research-concerned issues.

In this effort, we should keep in mind a question that could help in focusing on which priorities should be: what should be the issue related to ageing research that deserves more than others to be included in the next European Call?

In order to help the discussion during the 2<sup>nd</sup> Workshop, the WP3 coordination team sent a questionnaire to Workshop participants: their task was to rate the relevance (in a scale of relevance from 1 up to 4) of identified research topics (including cross-cutting perspectives) and methodological, infrastructure and transferability issues.

On a side, we hoped that results of the survey could serve as a basis for the discussion during the Workshop, in particular during the Working Group sessions. The survey could constitutes a first effort to prioritise items for the future Road Map.

On the other side, however, we were aware that results could not be in any case a definitive prioritisation: we reminded participants that results were not binding. The questionnaire was not a comprehensive instrument as it was not possible to resume in few items the complexity of ageing research in the social and economic field.

### **Methodology of the survey**

The small survey was based on a simple self-administered questionnaire which allowed us to retrieved information about the main scientific background of the respondents, the perceived relevance upon a selected list of items and the level of personal involvement of respondents in the different research items.

All scientists involved so far in the FUTURAGE consultations have been asked to fill in the questionnaire in the period between June 15<sup>th</sup> and July 5<sup>th</sup> 2010.

The 99 items of the questionnaire derived from many different sources:

- 1) the output of the 1<sup>st</sup> WP3 Workshop and the feedbacks received so far from other FUTURAGE bodies (Council of Scientists, Network Steering Committee, Stakeholders Meeting);
- 2) external sources i.e. the recommendations of the European Forum on Population Ageing Research, the Madrid Implementation Plan of Action on Ageing (MIPAA), and the U.S. National Institute on Ageing (NIA) Strategic Plan.

By collecting and merging topics from different sources, we aimed at ensuring a greater coordination between FUTURAGE and the already existing strategic documents in ageing research.

For each items of the questionnaire we calculated the mean score of the replies concerning the perceived relevance. Then we calculated the difference between this relevance and the relevance of the item for current research activities of the respondent.

We considered also interesting to “control” the perceived relevance with the current activities of the respondent, as this could represent a proxy indicator to identify under-investigated research areas.

### **Information on the sample**

41 out of 61 scientists who were asked to fill the questionnaire replied. We reached a good gender balance: 21 respondents were females and 20 males. Also a well balanced geographical representation has been achieved: the area most represented is the Mediterranean Europe (36.6% of respondents), followed by North-Western Europe (31.6%), Scandinavia (17%) and Eastern Europe (14,6%).

The questionnaire was sent to three different types of scientists: 30 respondents attended the 2<sup>nd</sup> Workshop; 6 have previously participated to the first meeting but could not attend the 2<sup>nd</sup>; the remaining 5 received an invitation both to the first and to the second meeting, but unfortunately were not able to come in any of the two meetings.

Of the overall 41 respondents, 9 have mainly a sociological background, 7 an economic one and 7 defined themselves as social gerontologists. We noticed that most of respondents have a clear multidisciplinary background. This is confirmed by the 3.1 disciplines indicated on the average by respondents as their scientific background.

### **Structure of the list of topics**

The results of the survey are available in next tables: for each research area (WG1, WG2, WG3, WG4 and cross-cutting issues) they provide both the rating of the *most relevant topics* and the rating of the *research gaps*. Please note that the tables concerning methodology, infrastructure and transferability provide only the rating of the most relevant issues.

## WG1

### *Most relevant topics*

Rank		N	Mean	Std. Deviation
1	Activities in the family: caring, grand-parenting, intergenerational relations, partners and sexuality (also in a gendered perspective)	41	3.59	0.67
2	Prerequisites for activation of older people (older people) as social and economic resources for the society (Supportive environment, Health and capacities, Money and wealth, lifelong learning, and role of media)	41	3.49	0.68
3	Activities in the labour market: economic treatment and retirement, productivity of older people, black and grey market, private/public sectors	41	3.41	0.71
4	Barriers and opportunities for the different activities (e.g. infrastructures, legal barriers, age discrimination)	41	3.37	0.66
5	Effects of older people's activation for governments, society, welfare states, and companies	40	3.33	0.62
6	Volunteering, active citizenship and political participation, including: research on motivations for volunteering and its relationships with formal labour activities and giving economic value to volunteering	41	3.32	0.72
7	Learning and teaching: peers and intergenerational teaching, the role of ICT, evaluation of efficiency and efficacy of lifelong education programmes, financial and functional literacy	41	3.27	0.63
8	Motivations for the activity of older people in the paid labour market, discriminations, and the role of ergonomics of workplace	41	3.22	0.76
9	Public policies: individual choice vs. policy-driven changes, normative expectations vs. choices	40	3.15	0.70
10	Effects of activation for individuals in terms of identity, perception of ageing, family and social relationships, attitudes and expectations among different generations	41	3.15	0.76
11	Preparation for retirement and old age: financial literacy, nutrition, ICT, psychological, etc.	40	2.95	0.82
12	Activities in everyday life: fashion, ICT & media use, social relationships, sleep/rest, time use, leisure, mobility, sports	40	2.75	0.87
13	The compression of working life into the early-middle adulthood and its social consequences on older people	40	2.70	0.94

### *Research gaps*

Rank		N	Mean	Std. Deviation
1	Preparation for retirement and old age: financial literacy, nutrition, ICT, psychological, etc.	40	0.80	0.72
2	Learning and teaching: peers and intergenerational teaching, the role of ICT, evaluation of efficiency and efficacy of lifelong education programmes, financial and functional literacy	41	0.71	1.05
3	Volunteering, active citizenship and political participation, including: research on motivations for volunteering and its relationships with formal labour activities and giving economic value to volunteering	40	0.70	0.85
4	Activities in everyday life: fashion, ICT & media use, social relationships, sleep/rest, time use, leisure, mobility, sports	39	0.67	1.18

5	Motivations for the activity of older people in the paid labour market, discriminations, and the role of ergonomics of workplace	41	0.66	0.96
6	Activities in the labour market: economic treatment and retirement, productivity of older people, black and grey market, private/public sectors	40	0.63	1.08
7	Public policies: individual choice vs. policy-driven changes, normative expectations vs. choices	40	0.58	1.03
8	Barriers and opportunities for the different activities (e.g. infrastructures, legal barriers, age discrimination)	40	0.53	1.01
9	Effects of older people's activation for governments, society, welfare states, and companies	40	0.50	0.93
10	The compression of working life into the early-middle adulthood and its social consequences on older people	40	0.48	1.06
11	Prerequisites for activation of older people (older people) as social and economic resources for the society (Supportive environment, Health and capacities, Money and wealth, lifelong learning, and role of media)	41	0.46	0.81
12	Activities in the family: caring, grand-parenting, intergenerational relations, partners and sexuality (also in a gendered perspective)	41	0.37	1.09
13	Effects of activation for individuals in terms of identity, perception of ageing, family and social relationships, attitudes and expectations among different generations	41	0.32	1.01

## WG2

### *Most relevant topics*

Rank		N	Mean	Std. Deviation
1	Economic needs: income maintenance, pension system, covering long term care, consumption patterns over the life course	41	3.66	0.58
2	Changes in social support systems as a result of social security/pension reform – implications for individuals, family and society	40	3.48	0.60
3	Social/health needs: social inclusion, representations in media and society, solidarity mechanisms	41	3.44	0.78
4	Factors influencing resource allocation and expenditures for older people, and evaluation of its impact, especially relating to poverty reduction and improvement of the health and well-being of older people	40	3.35	0.83
5	Vulnerability: elder abuse and neglect, living arrangements, life-long disadvantages	41	3.34	0.66
6	Evaluation of status and sustainability of existing informal and formal support systems	39	3.31	0.83
7	Multidimensional nature of poverty and its impact on older persons (including age specific poverty indicators)	39	3.23	0.90
8	Evaluation of existing models of social security and identification of best practice	40	3.15	0.83
9	Needs of older persons arising from technological change and economic advancement	40	3.15	0.58
10	Mechanisms for ageing migrants' adaptation in migration destinations (incl. family relationships between migrants and their older parents in original countries)	40	3.10	0.84
11	Images of ageing, ageism and age discrimination in different societies (including the issue of mandatory retirement)	41	3.07	0.79
12	Economic costs of drugs and medication use by older people	39	3.03	0.93

13	Patterns of resource availability to older persons; use and exchange of resources by older persons	39	2.85	0.81
14	Informal economy based income security in old age	39	2.85	0.93
15	Cultural needs: religion and spirituality, communication and media utilization	41	2.61	0.77
16	Displacement of and support for older persons in emergency situations, such as man-made and natural disasters	39	2.46	0.94

**Research gaps**

Rank		N	Mean	Std. Deviation
1	Economic costs of drugs and medication use by older people	38	1.34	1.15
2	Needs of older persons arising from technological change and economic advancement	39	1.15	0.87
3	Mechanisms for ageing migrants' adaptation in migration destinations (incl. family relationships between migrants and their older parents in original countries)	38	1.03	0.85
4	Displacement of and support for older persons in emergency situations, such as man-made and natural disasters	38	1.00	0.96
5	Factors influencing resource allocation and expenditures for older people, and evaluation of its impact, especially relating to poverty reduction and improvement of the health and well-being of older people	38	0.92	1.15
6	Economic needs: income maintenance, pension system, covering long term care, consumption patterns over the life course	38	0.92	1.00
7	Informal economy based income security in old age	38	0.87	1.04
8	Evaluation of existing models of social security and identification of best practice	38	0.87	1.17
9	Cultural needs: religion and spirituality, communication and media utilization	39	0.85	1.09
10	Vulnerability: elder abuse and neglect, living arrangements, life-long disadvantages	39	0.79	0.98
11	Multidimensional nature of poverty and its impact on older persons (including age specific poverty indicators)	38	0.79	1.02
12	Patterns of resource availability to older persons; use and exchange of resources by older persons	37	0.76	0.98
13	Changes in social support systems as a result of social security/pension reform – implications for individuals, family and society	39	0.72	1.05
14	Social/health needs: social inclusion, representations in media and society, solidarity mechanisms	39	0.41	0.72
15	Evaluation of status and sustainability of existing informal and formal support systems	38	0.37	1.05
16	Images of ageing, ageism and age discrimination in different societies (including the issue of mandatory retirement)	39	0.36	1.11

### WG3

#### *Most relevant topics*

Rank		N	Mean	Std. Deviation
1	Relationship between informal carers and the formal care system	41	3.41	0.74
2	Care policies: legislation, cash for care schemes and services to support carers	39	3.41	0.79
3	Care arrangements in a gender, cohort & life course perspective	40	3.33	0.76
4	Impact of migration on care	38	3.26	0.76
5	Rewards and costs of caring: social and economic perspectives	39	3.18	0.85
6	Carers resources: time, functional abilities, knowledge and health	40	3.17	0.75
7	Relationships between caregiving and the new patterns of solidarity and individualism	40	3.15	0.83
8	Relationships between carers and cared-for in the new family settings	39	3.13	0.83
9	Policies and incentives for involving older people in informal caregiving also beyond family settings	40	3.07	0.83
10	Influence of working life on care	39	3.05	0.89
11	Community structures and city patterns facilitating caring	39	3.03	0.84
12	Company measures addressed to older carers: conciliation between work and care	39	3.00	0.92
13	The conceptualisation of quality of care: differences between caregivers and care recipients	40	2.95	0.82
14	Cultural perceptions about caring	40	2.85	0.89
15	Preferences and obligations of older people involved in informal caregiving	39	2.85	0.90
16	Content of the care being provided and related instruments	38	2.82	0.73
17	Older women as caregivers to persons infected with and affected by HIV/AIDS	39	2.13	1.01

#### *Research gaps*

Rank		N	Mean	Std. Deviation
1	Impact of migration on care	37	0.81	1.02
2	Care arrangements in a gender, cohort & life course perspective	38	0.79	0.93
3	Relationships between caregiving and the new patterns of solidarity and individualism	38	0.74	0.89
4	Older women as caregivers to persons infected with and affected by HIV/AIDS	38	0.74	0.79
5	Carers resources: time, functional abilities, knowledge and health	38	0.74	1.03
6	Policies and incentives for involving older people in informal caregiving also beyond family settings	38	0.68	0.77
7	Influence of working life on care	38	0.68	0.96
8	Relationships between carers and cared-for in the new family settings	38	0.68	0.84
9	Content of the care being provided and related instruments	37	0.62	0.79
10	Community structures and city patterns facilitating caring	38	0.61	1.10
11	The conceptualisation of quality of care: differences between caregivers and care recipients	38	0.61	0.95

12	Relationship between informal carers and the formal care system	39	0.56	1.02
13	Company measures addressed to older carers: conciliation between work and care	38	0.55	0.89
14	Cultural perceptions about caring	38	0.55	0.83
15	Care policies: legislation, cash for care schemes and services to support carers	38	0.53	1.08
16	Rewards and costs of caring: social and economic perspectives	37	0.51	0.90
17	Preferences and obligations of older people involved in informal caregiving	38	0.47	0.76

## WG4

### *Most relevant topics*

Rank		N	Mean	Std. Deviation
1	Sustainability of long-term care systems	38	3.68	0.47
2	Integration of health and social care systems	39	3.56	0.68
3	Home care for older people: quality of care, quality of life, migrant care workers, role of civic society	39	3.51	0.60
4	Facilitating transitions between care settings, e.g. from/to hospital and home and community. Care continuum model	39	3.41	0.68
5	Residential care for older people: quality of care, quality of life, migrant care workers, role of civic society, alternatives forms of care	39	3.36	0.63
6	Training needs and strategies to generate sufficient and adequate human resources at appropriate care levels	38	3.32	0.70
7	Insurance systems and long term care: economic value and consequences of private health insurances	38	3.32	0.78
8	Effective public-private mixes of care delivery systems in different settings	38	3.29	0.84
9	Impact of cross-cutting factors on home and residential care use: welfare regimes, impact of income & housing, impact of formal and informal care mix	39	3.28	0.61
10	Accessibility of care system: communication and interaction with professionals	38	3.16	0.75
11	Evaluation of the use of e-health and e-care instruments	38	3.05	0.77
12	Understandings of Dependency/Independency in different perspectives: considering different stakeholders, welfare regimes, and socio-cultural values	38	3.05	0.77
13	older people's experience in dependency/independency	38	3.00	0.93
14	Mapping available care systems in different cultures and settings, taking into account demographic trends	39	2.92	0.81
15	The provision, accessibility and utilization of health care for older women	38	2.79	0.81

### *Research gaps*

Rank		N	Mean	Std. Deviation
1	Evaluation of the use of e-health and e-care instruments	37	1.22	0.95
2	Insurance systems and long term care: economic value and consequences of private health insurances	37	1.19	1.08

3	Facilitating transitions between care settings, e.g. from/to hospital and home and community. Care continuum model	37	1.14	0.95
4	Training needs and strategies to generate sufficient and adequate human resources at appropriate care levels	37	1.03	0.93
5	Sustainability of long-term care systems	37	1.03	1.21
6	Understandings of Dependency/Independency in different perspectives: considering different stakeholders, welfare regimes, and socio-cultural values	36	0.94	0.98
7	Accessibility of care system: communication and interaction with professionals	37	0.89	0.90
8	Integration of health and social care systems	37	0.86	1.00
9	Effective public-private mixes of care delivery systems in different settings	36	0.78	0.99
10	older people's experience in dependency/independency	36	0.78	0.83
11	Residential care for older people: quality of care, quality of life, migrant care workers, role of civic society, alternatives forms of care	38	0.76	1.00
12	The provision, accessibility and utilization of health care for older women	37	0.68	0.85
13	Impact of cross-cutting factors on home and residential care use: welfare regimes, impact of income & housing, impact of formal and informal care mix	38	0.66	0.85
14	Home care for older people: quality of care, quality of life, migrant care workers, role of civic society	38	0.66	1.07
15	Mapping available care systems in different cultures and settings, taking into account demographic trends	37	0.54	0.80

## Cross-cutting issues

### *Most relevant topics*

Rank		N	Mean	Std. Deviation
1	Impact of population ageing and other demographic changes on social and -economic systems and on family life	40	3.67	0.57
2	Role of socio-economic inequalities in ageing	40	3.63	0.54
3	Study of generations and intergenerational relationships	40	3.50	0.64
4	Quality of life in older age, including: international harmonized measures of QoL, determinants of QoL, cultural and other variations in the meaning of QoL, meaning of life for older people, Life-long learning and QoL of older people, Disability and QoL in older age	40	3.47	0.64
5	Globalisation and ageing	39	3.18	0.85
6	Ageing in different setting (e.g. rural vs. urban settings)	40	3.10	0.84
7	Relations between pension system and health care	40	3.08	0.97

### **Research gaps**

Rank		N	Mean	Std. Deviation
1	Relations between pension system and health care	38	0.89	0.92
2	Quality of life in older age, including: international harmonized measures of QoL, determinants of QoL, cultural and other variations in the meaning of QoL, meaning of life for older people, Life-long learning and QoL of older people, Disability and QoL in older age	39	0.74	0.82
3	Role of socio-economic inequalities in ageing	38	0.66	1.05
4	Globalisation and ageing	37	0.65	0.86
5	Impact of population ageing and other demographic changes on social and -economic systems and on family life	39	0.54	1.02
6	Ageing in different setting (e.g. rural vs. urban settings)	39	0.51	1.12
7	Study of generations and intergenerational relationships	39	0.51	0.72

## **Methodology**

### **Most relevant issues**

Rank		N	Mean	Std. Deviation
1	Expanding use of longitudinal studies, follow up studies, and cohort studies	39	3.74	0.50
2	Coordination and collaboration in future ageing research: representation of new Member States, non-European countries, and underrepresented areas (Southern and Central Europe)	38	3.61	0.68
3	Investing more into interdisciplinary research (including the education of interdisciplinary persons and researchers), also involving experts from other fields (e.g. economics, law)	39	3.36	0.78
4	Methods for evaluation of cost-effective interventions (including improving indicators to measure the effect of interventions)	39	3.36	0.74
5	Improve coordination of current ageing research by linking better different research projects and strengthening systematic literature reviews	38	3.32	0.78
6	New approaches of collecting data: comparability, description of contexts, qualitative methods	38	3.29	0.84
7	Giving value to existing data (including consolidation of information from multiple sources. Establishment of linkages between databases)	39	3.23	0.87
8	Time for implementation of research	35	3.14	0.85
9	Increasing older people participation and involvement in research	38	3.13	0.96
10	Measurement of all elements of older people's contribution to family and society. Further exploration and categorization of such elements for use in field studies designed to demonstrate the contributions.	39	3.08	0.98
11	Investing more in theoretical research and definitions	38	3.05	1.01
12	Investing more on the issues concerning the comparability of researches and data	38	3.03	0.75
13	Transparency of research design assumptions	38	3.00	0.90
14	Including into the analyses the regional level	39	3.00	0.83

15	Further develop specific methods, such as social network analysis, time use studies, risk maps and adapting existing methods/approaches to ageing research	37	3.00	0.91
16	Clarify the links between qualitative and quantitative methodologies	37	2.76	1.14
17	Improvement of methods to measure disability, that enable valid comparisons across time and place and between social groups	39	2.74	0.82
18	Having a focal point somewhere which can be consulted for methodological issue like comparative research, survey design, concepts and terminology	38	2.68	1.09

## Infrastructure and Transferability

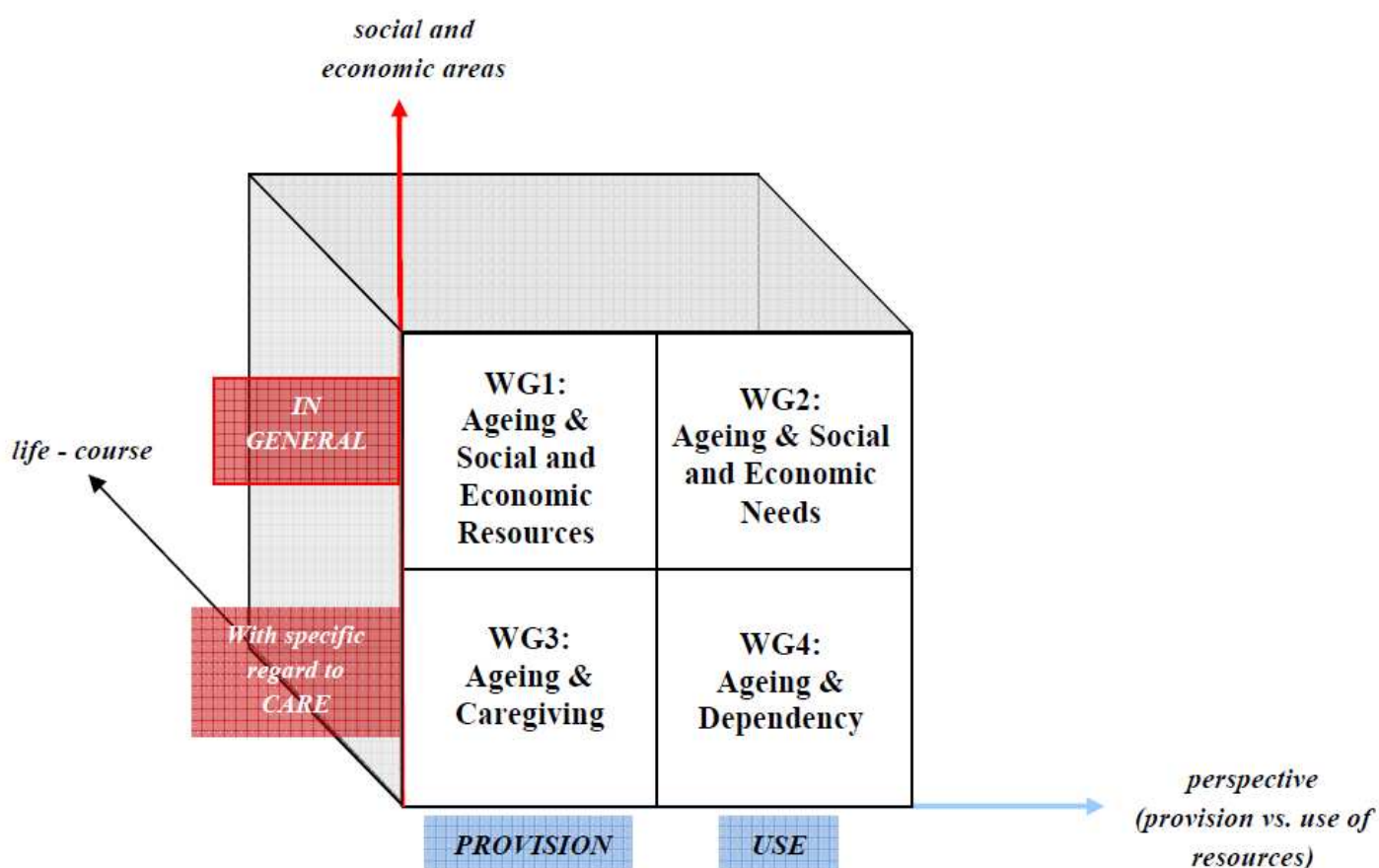
### *Most relevant issues*

Rank		N	Mean	Std. Deviation
1	More funds for ageing research in Europe (developing new funding structures for ageing research?)	38	3.84	0.55
2	Need to improve the transferability of ageing research into policies (also making available specific funding for research transfer)	38	3.58	0.64
3	Make population census data available for research in all European countries (and harmonizing it)	38	3.50	0.73
4	Educating new generation of ageing researchers	39	3.49	0.64
5	Developing a common European research agenda	38	3.39	0.86
6	Increasing the capacity of the countries where ageing research isn't developed yet	39	3.38	0.71
7	Disseminating information to the public, medical and scientific communities, and policy-makers; need to communicate and share research best practices	39	3.36	0.71
8	Developing specific "follow-on funds" to support successful projects	37	3.30	0.66
9	Develop age-specific socio-economic indicators	38	3.24	1.00
10	Adequate baseline data on the health status, well-being, and socio-economic situation of older people	38	3.24	1.00
11	Get Stakeholders (including older people) systematically involved in ageing research	39	3.21	0.95
12	Developing an European Central Institute on Ageing	36	3.14	0.96
13	Lack of journals for publishing the results of interdisciplinary research	37	2.68	0.97

## Annex 4. Other conceptual frameworks proposed by Working Groups

Among the tasks assigned to Workshop participants, there was the improvement of WP3 conceptual framework in order to better reorganized the emerging research issues. The discussion inside WGs was fruitful: 3 out of 4 WGs produced alternative conceptual framework to the one proposed before the Workshop by WP3 coordination team (see Figure 1).

Figure 1. The original conceptual framework for the 2<sup>nd</sup> Workshop



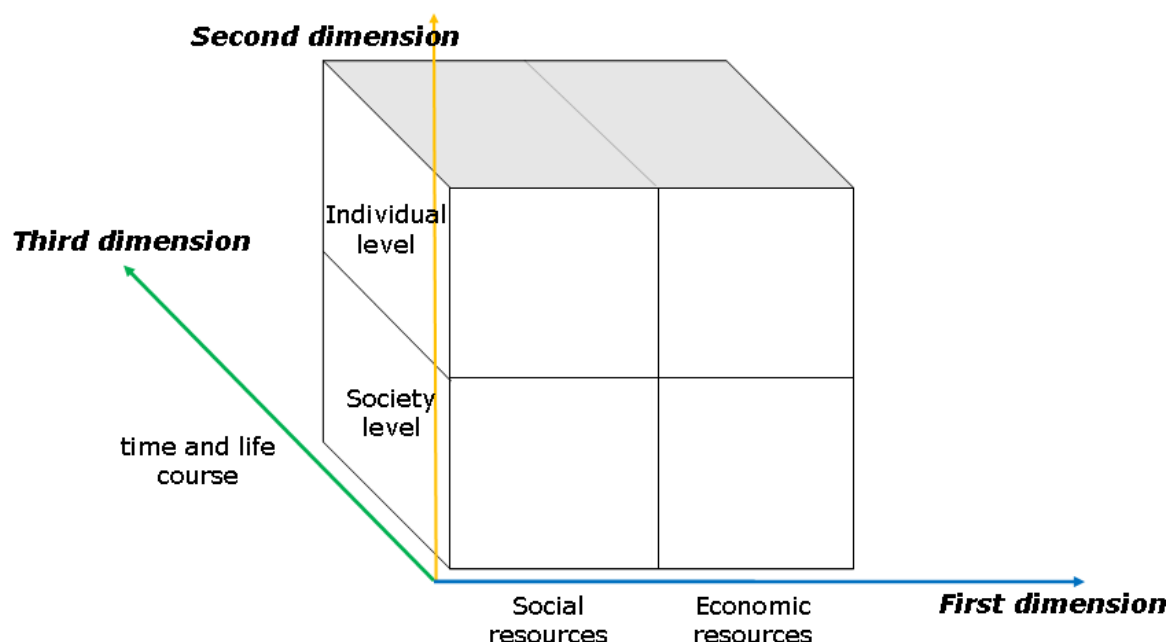
### New conceptual framework from Working Group 1

The original conceptual framework was debated extensively: the WG participants expressed the will to overcome some ambiguities and limits of such an instrument. For example, there was consensus within the WG to consider the conceptual framework to be too much focused on care: half of the conceptual framework was related to the "Care" area (caregiving and dependency). In WP3, "Care" should be considered as a simple sub-dimension of the Social & Economic Resources research area, on the same level as other issues (e.g. work, family, social capital).

A new general conceptual framework for WG1 was elaborated, in order to integrate all participants' contributions and provide a helpful theoretical instrument. They proposed to display the resources and research topics in a new 3D matrix (Figure 2):

- **First dimension:** *economic resources and social resources;*
- **Second dimension:** *resource for the individual and resource for society;*
- **Third dimension:** policies and promotional efforts (individual and collective) in the *short-, middle- and long-term* and over the *life course* (the process of ageing). In this dimension, individuals have to be considered not only in their old age, but also in their previous phases of life. For example, the concept of “old” may differ in a substantial way: in the labour market, persons become “old” very early (ageism of workers over 55), but it is not so regarding everyday life (usually 65-70).

**Figure 2. New conceptual framework from WG1**



The new conceptual framework helped the participants to focus on the main issues concerning the research on social and economic resources in the ageing field. The main issues, approved by all WG participants, were the following:

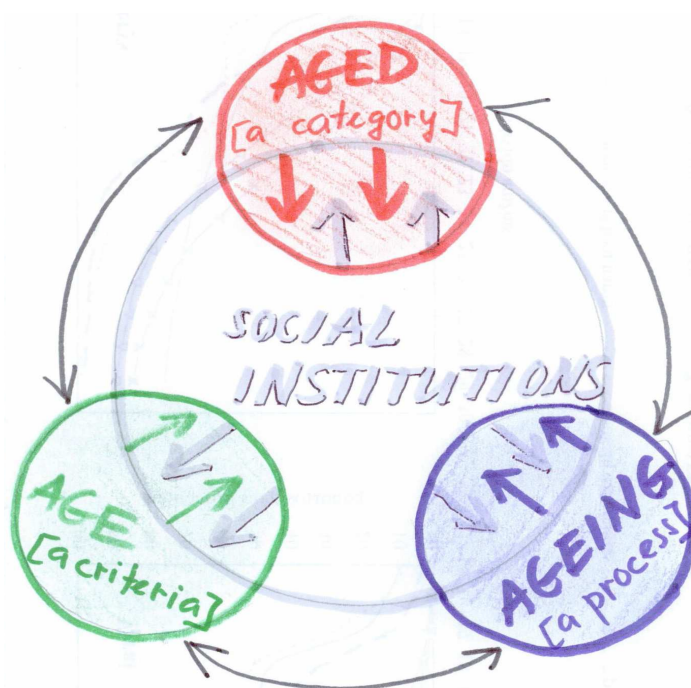
- I. **How do and can older people utilize and acquire resources and thereby have a decent level of individual well-being?**
  - I.a What are the potential and available resources?
  - I.b What facilitates and frustrates the acquisition and use of resources?
- II. **What societal resources do older people contribute, thereby improving societal well-being?**
  - II.a What are the potential and available resources?
  - II.b What facilitates and frustrates the acquisition and use of resources?

### **New conceptual framework from Working Group 2**

The proposal arose from WG2 concerned not only the area of Social & Economic Resources, but also the ageing research field in general. In fact, participants defined three basic terms of interests<sup>1</sup> that should be taken into account in approaching ageing issues (Figure 3):

- **AGED:** the population of those who can be categorized as elderly in terms of their length of life lived or expected lifespan;
- **AGEING:** a developmental process (of individuals and societies);
- **AGE:** a dimension of structure and behavior within species.

**Figure 3. New conceptual framework from WG2**



These three terms obviously have points of contact with social institutions, from which they are influenced and that they can influence: we can notice an interdependency between social institutions and the terms of ageing research.

Examples of social institutions are: Ideologies (secular, religious); Culture; Law; Education system; Economic system; Health care system; Welfare system; Kinship system; Science. From this perspective, we can define the following general research questions according to set of issues:

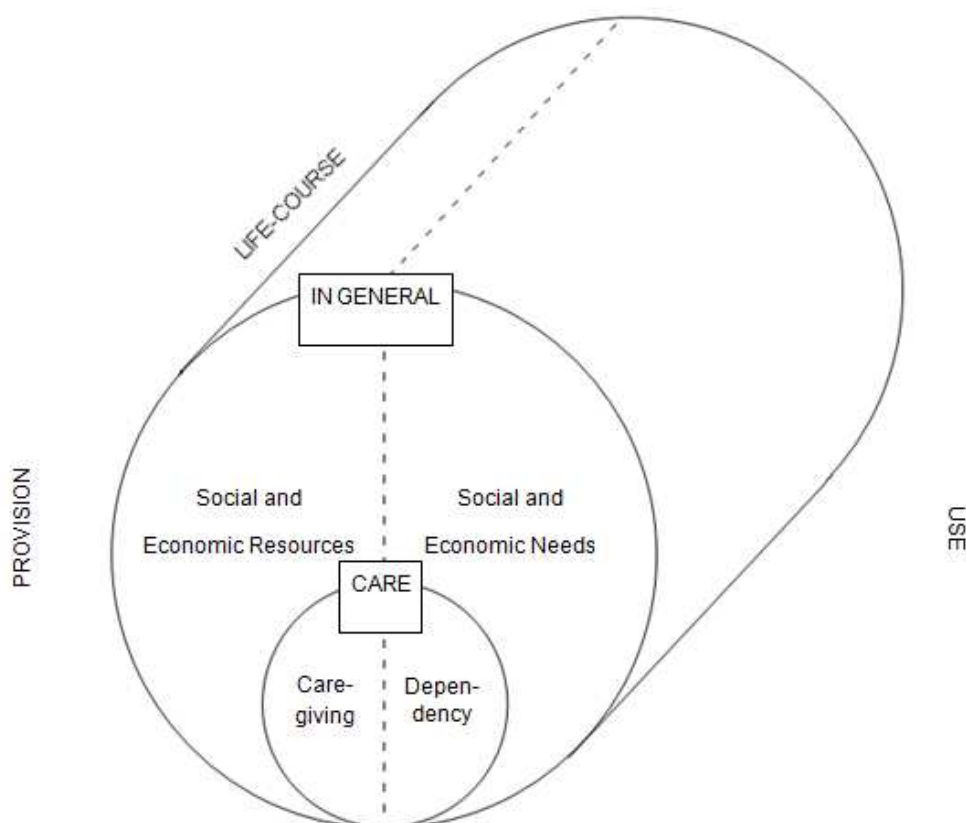
<sup>1</sup> See: Bengtson V.L., Putney N.M. & Johnson M.L. (2005). The problem of theory in gerontology today. In M.L. Johnson (ed.), *The Cambridge handbook of age and ageing* (pp. 3-20). Cambridge: Cambridge University Press.

- **AGED** (a social category) – that are the questions about practices: what are the practices to meet universal needs of people categorized as ‘aged’? What is the mutual impact of these practices and social institutions? It is a focus on functional gains and problems of aged populations.
- **AGEING** (a process) – that are the questions about dynamics: what are ageing caused changes in individuals and societies? What is their impact for social institutions and vice versa? The principal interest is in the situations and problems, which accumulate during time (life time of individual or history of society) and cannot be understood separate from developmental experiences and processes.
- **AGE** (a criteria) – that are the questions about meaning of term ‘age’, age norms and values: what is the attitude to and social construction of ‘age’? The phenomena to be explained relate to how individuals and social institutions take into account or deal with ‘age’, what are manifestations of ‘age’ as an organizing principle of our behavior and survival?
- **POLICY ANALYSIS** – this is research on policy intervention: applied research on policy formulation, implementation, evaluation, reformulation, etc. In the scheme its place is the overlapping area between ‘aged’ and ‘social institutions’ mainly, but it is related to the other overlapping areas as well.

### ***New conceptual framework from Working Group 3***

In order to improve the overall framework structure of WP3, participants suggested to redesign the “cube” used during the 2<sup>nd</sup> Workshop as a “tube” to better reflect the universal issue of Care within the area of Ageing & Caregiving (Figure 4).

**Figure 4. New conceptual framework from WG3**



This issue was expanded during the final plenary session of the Workshop, when WG4 suggested the combination of the results of WG3 and 4 into a single new area entitled “Ageing & Care”: this proposal was positively received by WG3. In fact, from the perspective of Social & Economic Resources, it could be more useful to consider only the dimension of Care instead of two sub-dimensions so strictly linked each other as Caregiving and Dependency.