



# **Evaluation of the European Year for Active Ageing and Solidarity between Generations**

## **Final Report**

Client: European Commission - DG Employment, Social Affairs and Inclusion

Rotterdam, 15 April 2014



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Inclusion

Alessandra Cancedda, Mike Blakemore, Neil Mc Donald, Annemieke Pickles, Thijs Viertelhuizen

Rotterdam, 15 April 2014

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ECORYS Nederland BV  
Watermanweg 44  
3067 GG Rotterdam

P.O. Box 4175  
3006 AD Rotterdam  
The Netherlands

T +31 (0)10 453 88 00  
F +31 (0)10 453 07 68  
E [netherlands@ecorys.com](mailto:netherlands@ecorys.com)  
Registration no. 24316726

**W [www.ecorys.nl](http://www.ecorys.nl)**

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# List of Acronyms and Glossary

## Acronyms

AAI	Active Ageing Index
Coalition	The EY2012 Stakeholder Coalition
CSO	Civil society organisation
DG	Directorate General
EC	European Commission
EIP-AHA	European Innovation Partnership on Active and Healthy Ageing
EQ	Evaluation Question
ESF	European Social Fund
EU	European Union
EY	European Year
ISG	Inter-Service Group
LGBT	Lesbian, Gay, Bi-Sexual and Transgender
MS	Member State
NC	National Coordinator
NGO	Non-Governmental Organisation
PROGRESS	Programme for Employment and Social Solidarity
SIP	Social Investment Package
SPC	Social Protection Committee
UN	United Nations
UNECE	United Nations Economic Commission for Europe
WHO	World Health Organization

## Glossary

### National Coordinators

Officers appointed by participating country governments to coordinate the activities of the EY2012

### Stakeholders

Organisations different from the European Commission (EU Stakeholders) and national governments (national stakeholders) that were involved in the design and implementation of the Year. The EU Stakeholders Coalition, in particular, involved a number of EU-level networks of organisations of employers, trade unions, civil society groups and regional and local authorities, some of which are funded under the EU PROGRESS programme.

### Target groups

The categories of persons or organisations that an intervention aims to reach, in this specific case the categories to be reached through the activities of the EY2012.



# Members of the EY2012 Stakeholders' Coalition

AGE Platform Europe  
Alzheimer Europe  
Assembly European Regions (AER)  
Association of Local Democracy Agencies (ALDA)  
Autism-Europe  
Caritas Europa  
CECODHAS - Housing Europe  
CEV (European Volunteer Centre)  
Confederation of Family Organisations in the European Union (COFACE)  
Council of European Municipalities and Regions (CEMR)  
Corporate Social Responsibility (CSR) Europe  
European Computer Driving License (ECDL) Foundation  
European Local Inclusion and social Action Network (ELISAN)  
Eurocarers  
Eurochild  
Eurocommerce  
Eurodiaconia  
EuroHealthNet  
European Anti-Poverty Network (EAPN)  
European Association of Homes and Services for the Ageing (EAHSA)  
European Association of Paritarian Institutions of Social Protection (AEIP)  
European Civil Society Platform on Lifelong Learning (Eucis-LII)  
European Disability Forum (EDF)  
European Federation of National Associations of Orthopaedics and Traumatology (EFORT)  
European Federation of Parents and Carers at Home  
European Federation of Retired and Older People (FERPA)  
European Foundation Centre  
European Health and Fitness Association (EHFA)  
European Hearing Instrument Manufacturers Association (EHIMA)  
European Institute of Women's Health  
European League Against Rheumatism (EULAR)  
European Medical Students' Association (EMSA)  
European Network Against Racism (ENAR)  
European Network of Social Authorities (ENSA)  
European Non-Governmental Sports Organisation (ENGSO)  
European Parkinson's Disease Association (EPDA)  
European Social Insurance Platform (ESIP)  
European Social Network (ESN)  
European Union Geriatric Medicine Society (EUGMS)  
European Union Federation of Youth Hostel Associations (EUFED)  
European Women's Lobby (EWL)  
European Youth Forum (YFJ)  
EuroSafe Fondation

HelpAge International  
International Association of Mutual Benefit Societies (AIM)  
International Diabetes Federation (IDF)  
International Federation for Spina Bifida & Hydrocephalus (IFSBH)  
International Osteoporosis Foundation  
Mental Health Europe (MHE)  
Red Cross/EU Office  
REIF - Protection Sociale Française  
SMES-EUROPA  
Standing Committee of European Doctors (CPME)  
The European Network of National Civil Society Associations (ENNA)  
The International Sport and Culture Association (ISCA)





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# Executive Summary

## Introduction

With the request for service n. 059 - VT/2012/082 ECORYS Netherlands was entrusted by the European Commission DG Employment, Social Affairs and Inclusion to conduct the ex-post evaluation of the European Year for Active Ageing and Solidarity between Generations (hereafter the 'EY2012' or 'the Year'). The evaluation exercise lasted twelve months (from January 2013 to December 2013). Its purpose was to undertake 'an overall assessment of the initiatives provided for in the Decision<sup>1</sup> with details of implementation and results' (art. 11 of the Decision). Several research methods were applied, quantitative and qualitative - interviews with EC officials, stakeholders such as representatives of networks of NGOs, local and regional authorities and social partners, the European Parliament and the communication contractor; a survey of National Coordinators; a survey of National Stakeholders; desk research on the EU and country websites and documents; case studies on Poland and Portugal and the Generations@school initiative; participation in the Meeting of National Coordinators and the EU Stakeholders Coalition organised by the Commission on 20-21 February 2013.

- The Year was celebrated through a series of European events:
- Opening event of the EY2012 in Copenhagen;
- Closing event of the EY2012 in Nikosia;
- Journalists' Conference;
- Conference on good governance for active and healthy ageing;
- Generations@school Project and award (420 schools participating);
- Senior Force Days;
- Awards (Journalist award, Life story challenge award, Workplaces for all ages award, Towards age-friendly environments award; 1386 candidature submissions in total).

Moreover, two important outputs of the Year were:

- the Active Ageing Index;
- the Guiding Principles for Active Ageing and Solidarity between Generations<sup>2</sup>.

National programmes were also designed and implemented by participating countries. Opening events involved on the whole 4,500 participants. A total of 748 national and transnational initiatives were implemented during the Year counting only those included in the EU database. In terms of thematic coverage, the focus was on bridging generations, support for social engagement and health promotion and preventative health care. Overall, participation in society appears to have attracted most interest amongst the three overarching themes (employment, health and independent living and participation in society).

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<sup>1</sup> Decision no 940/2011/EU of the European Parliament and of the Council of 14 September 2011 on the European Year for Active Ageing and Solidarity between Generations (2012).

<sup>2</sup> Council Declaration on the European Year for Active Ageing and Solidarity between Generations (2012): The Way Forward, Brussels, 7 December 2012.

## Main findings

### Relevance

The **choice of promoting an European Year on Active Ageing** and Intergenerational solidarity was highly relevant. The relevance of the EY2012 is rooted in the following:

Long-standing identification of the importance of the issue;

- The high degree of relevance to Member States, all dealing with similar problems (albeit in different contexts);
- The multi-faceted nature of the issue, covering a wide range of economic, technical and social issues;
- The need to link challenges and opportunities and highlight benefits, not just negative aspects of ageing.

The choice of the **thematic priorities** – employment, health and independent living, participation, intergenerational solidarity – was consistent with prior thematic analyses and policy activity conducted on active ageing at EU level and internationally.

The relevance of the **objectives** chosen for the EY2012<sup>3</sup> was generally uncontroversial. These objectives mirror the needs and policy priorities already agreed by Member States and set out in the various preceding policy documents. The objectives also link to those of the previous Years (EY2010 for example) and reflect the limitations on the EU's leverage on social issues which, by and large, remain a national responsibility.

The evidence indicates that the **types of activities** undertaken were appropriate to the needs of Member States and EU citizens. National Coordinators and stakeholders were able to choose and tailor initiatives to their own contexts and priorities, with support from the Commission's communications contractor.

### Effectiveness and impact

Based on the information collected from National Coordinators, the plans made at the beginning of the EY in the National Programmes were respected "to a large extent" in a vast majority of countries. The only exceptions were France, Finland and UK, which delivered the programme "to some extent", and Malta, which did so "to a limited extent". Furthermore, all types of outputs considered in the intervention logic were produced in at least half of the participating countries. The outputs linked to communication and awareness raising (information campaigns, training and awareness-raising seminars, conference and events) were the most often delivered; two thirds of respondents also mentioned knowledge outputs like mutual learning seminars, reports, surveys; a similar share reported the delivery of outputs formalising policy commitments.

In our view the **specific objectives**<sup>4</sup> are to be considered partly achieved, according to the feedback from national stakeholders and the response of National Coordinators. The best results were achieved on awareness-raising through EU-level and national initiatives and events, which were more often targeted to relevant organisations and civil society groups than individuals.

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<sup>3</sup> With reference to the logic model, the specific objectives were aimed at raising general awareness, creating a framework (for commitment and action), and stimulating debate and exchange of information.

<sup>4</sup> The awareness of policy makers of all levels, civil society, social partners and the business community has been raised, debate has been stimulated, information has been exchanged among policy-makers and stakeholders, mutual learning has been developed, and a framework has been offered to policy-makers and stakeholders to make public commitments and to take concrete action.

The Year achieved its **intermediate objectives** of strengthening existing networks, creating synergies and partnerships between government levels and policy areas, promoting policies and long-term strategies and making available technological, organisational and social innovations. The objective of establishing new networks was rarely achieved. The development of national policies, strategies and comprehensive programmes on active ageing in a number of countries (AT, BE, BG, CZ, DE, EE, ES, FR, LT, MT, PL, RO, SE, SI, SK) provides evidence of the policy impact of the Year.

Overall, the Year succeeded in its ultimate goal of **mobilising relevant actors** around active ageing and intergenerational solidarity.

In terms of outreach to **different target groups**, the main achievement appears to be the mobilisation of civil society organisations. The involvement of regional and local governments was also significant, but did not happen in all countries - the dynamism and visibility of National Coordinators to local governments may have made the difference here. The involvement of social partners was variable - as is the landscape of social partner organisations and the tradition of industrial relations in Member States -, and the majority of National Coordinators considered that private businesses were not reached to any great extent (even though they appear as promoters of a moderate share of the initiatives included in the EY2012 database - 73 in total). Regarding outreach to the general public via the media, the picture is mixed, with countries equally divided between those that claim to have succeeded to a large or very large extent, and those that consider success as partial or limited. Limited success was sometimes attributed to lack of the level of funding required for a sustained communication campaign.

Overall, the various **EU level events made a strong contribution** to the achievement of the goals of the EY2012. The strongest contribution was from the opening event in Copenhagen, the Generations@school initiative and award and the EU awards for social entrepreneurs, journalists, age-friendly environments. The Seniorforce Day did not realise its full potential, as a result of the late approval of the Decision and the related contractual delays, and had to revert to a series of smaller, national events, which lessened its impact. Two of the awards (Age-friendly workplaces and Life-story challenge) would have required more time for preparation and stakeholders mobilisation and were not as successful as they could because of the delayed implementation schedule. The Journalists' conference was also affected by implementation difficulties, and although organised at short notice nevertheless had an impact. The EU website was widely appreciated as a cost-effective initiative, but the number of unique visitors was comparatively lower than for other Years (although we could not ascertain whether these was compensated by more visits to national websites). The degree of engagement with social media on the part of participants and stakeholders also appeared limited, at least at the EU level.

### Complementarity

At **EU level**, there was strong complementarity between the Year and other on-going policy activities. In DG EMPL the EY2012 was complementary to the White Paper on Pensions and the Demographic Forum. Externally to DG EMPL, the Year had the strongest complementarity with the activities of DG SANCO (via its 2<sup>nd</sup> Health Programme and especially the European Innovation Partnership on Active and Healthy Ageing), DG JUST (via the planned Accessibility Act, a legislative initiative to ensure that goods and service are accessible to people with impairments); and DG CONNECT (e.g. European Innovation Partnership on Active and Healthy Ageing). There was also interaction with DG EAC (high-level conference on adult education) and DG RTD (specific call for proposals). The consultation evidence suggests that the Inter-service Group established to facilitate collaboration between DGs worked well.

The evaluation found multiple instances where the EY2012 was clearly complementary to policies implemented in **Member States**. The EY2012 helped refining the national policy agendas on active ageing and stimulated the exchange of good practices between countries. The **EU added value** of the Year is demonstrated by the evidence of volume, process, scope, agenda setting, innovation and learning effects. The EY2012 increased the number of initiatives for promoting active ageing in the Member States and strengthened the knowledge and skills of stakeholders involved in the organisation of the Year. Furthermore, the EY2012 offered organisations and individuals from different Member States the opportunity to become involved in national activities of another country. In countries with an existing national agenda on active ageing and intergenerational solidarity, the EY2012 strengthened the level of policy commitment and brought added value by introducing and disseminating innovations. The scope of active ageing policies was broadened in a large number of participating countries through the inclusion of new topics and a more holistic approach to active ageing and intergenerational solidarity. Whereas the issue of active ageing was previously mainly confined to health policies and/or employment policies, the issue is now addressed via multiple policy areas.

### Efficiency

In terms of the budget, the EY2012 falls within the lower end of the range of European Years, second only to the least funded Year in the series 2009-2012 (EY2009, which had no specific budget). Nonetheless the evidence suggests that a great deal was achieved by the EY2012, to some extent mirroring the findings of the EY2009 evaluation (i.e. that existing and non-EU resources can be mobilised effectively and outcomes and impacts are not necessarily proportional to direct levels of spending). It may therefore be argued that (at least) **comparable results were achieved using fewer resources than in other European Years**.

### Gender and social inclusion mainstreaming

**Gender mainstreaming** was considered from the start of the EY2012 and included in the activities promoted by the Stakeholders Coalition and several Member States. Gender-focused members of the Stakeholders' Coalition played an important role in this regard, although the gender approach as applied in practice focussed almost always on women's and not also men's specific needs. In general, the EY2012 was led predominantly by women and the main national events attracted and included women more often than men.

The EY2012 covered a wide range of issues that elderly people face related to **disability**, especially health and independent living. Both at EU and MS level, the initiatives addressed disability directly and indirectly. The activities of the EY2012 by and large ensured the **accessibility** of the built environment at events and provided facilitations such as sign language interpreters and transportation at various occasions. The EU website contained options for larger fonts.

### Implementation and delivery mechanisms

**Management structures and tools employed at EU level** were appropriate and functioned satisfactorily. Working relationships between the EC, NCs, EC Representations, stakeholder groups and the communication contractor were strong and a high degree of collaboration and cooperation was achieved, which served to increase the effectiveness of the Year. The available data suggests that mechanisms at **national level** were also largely effective.

In terms of process, **timing** emerged as a significant issue: the EY2012 was relatively late in gaining final approval, although fortunately some valuable preparation activity had been carried out well in advance of the Year (even before 2011) and some key mechanisms were already in place (e.g. the Stakeholders' Coalition, meetings of National Coordinators). The timetable did however present some difficulties and this led to significant impacts, notably contracting delays resulting in

the lost opportunity to deliver the Seniorforce Day initiative at EU level and link it to the awards, and the compressed timeframe available to organise the Journalists' conference.

At EU level, **the involvement of stakeholders** was well organised, based on a partnership approach and highly valued by those concerned. An inclusive, open and joint approach paid dividends in terms of informing the development and delivery of the Year; and stimulating continuing partnerships and networks in future. There is ample evidence that stakeholders were very satisfied with the coordination provided by the EC team.

At national level, a range of stakeholders participated, as shown by the analysis of the initiatives in the EY2012 database: this included strong involvement of NGOs, national authorities (other than NCs), regional and local authorities and EC Representations. Social partners and private sector companies were also represented. This evidence suggests delivery mechanisms were able to involve a cross-section of appropriate stakeholders at national level; and facilitate the engagement of a range of regional organisations as well. The fact that almost all countries had some form of national stakeholder committee or coalition is likely to have played a role in achieving the result.

### Sustainability

At **EU level**, there are some grounds to support the sustainability of the agenda-setting effects of the EY2012 in the various on-going and follow-up activities.

The Social Investment Package Communication produced by DG EMPL has kept the intergenerational approach alive. In fact, under the heading Social Investment throughout the individual's life the Commission urges Member States to implement the recommendations on Investing in Children and Policies to Reduce Early School Leaving, and to use the Guiding Principles for Active Ageing and Solidarity between Generations and the Active Ageing Index. The Social Investment Package is important because it also guides the use of the European Social Fund that is a major resource pool for the implementation of social policies. Furthermore, a report on long-term care was published in 2013 with clear connections to the knowledge developed during the Year<sup>5</sup>. Moreover, DG EMPL is awarding grants to Member States authorities to develop comprehensive strategies on active ageing<sup>6</sup>.

DG SANCO and DG CONNECT have continued to work with a large number of scientific partners and stakeholders on the EIP-AHA, the other important legacy initiative of the Year. Although mostly focused on health and independent living, the EIP-AHA has kept a link with broader social and environmental policies in its component on innovation for age-friendly buildings, cities and environments, which is led by AGE Europe. The European Commission and WHO are working together to produce a version tailored to Europe of the guidelines for age-friendly cities published by the international organisation. In summer, a brochure has been produced with good practice examples of innovation<sup>7</sup>.

Other DGs have followed up on specific aspects of active ageing, for instance DG JUST via its European Network of Experts on Gender Equality has published a study on gender gap in pensions<sup>8</sup>.

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<sup>5</sup> OECD Health Policy Studies A Good Life in Old Age? Monitoring and improving quality in long-term care, OECD/European Union, 2013.

<sup>6</sup> Call for Proposals VP/2013/009.

<sup>7</sup> European Innovation Partnership on Active and Healthy Ageing Excellent innovation for ageing A European Guide, <http://ec.europa.eu/digital-agenda/en/newsroom/all/brochure>.

<sup>8</sup> [http://ec.europa.eu/justice/gender-equality/files/documents/130530\\_pensions\\_en.pdf](http://ec.europa.eu/justice/gender-equality/files/documents/130530_pensions_en.pdf).

Based on the information collected **in the participating countries**, there are indications that the effects of the EY2012 are lasting beyond the Year itself and at least some of them will be sustained over a longer time period. A large majority of National Coordinators confirmed that at least some of the activities undertaken during the Year lasted beyond 2012 and 11 countries report that this is the case for at least half of the activities. Moreover, in certain countries comprehensive strategies and plans were adopted, while in other ones there were outputs at the level of concept papers, charters, pieces of legislation covering specific issues, or projects.

## Lessons for future European Years

### Preparation

The evaluation revealed the importance of choosing a “mature” theme for the success of a European Year. Active ageing was clearly such a theme. It is important to improve and fine-tune the **process leading to the decision of the Year’s theme**, to ensure that this is always the case. To achieve this, the EC could take the following steps.

- **Formalise clear mechanisms for selecting the theme of the Year**, with well-defined procedures, objectives and responsibilities for the management of a transparent, centralised, multi-annual process. This should include the setting out of the core criteria and characteristics that describe a ‘good’ theme for a European Year (based on the maturity of the policy theme aspect identified in this evaluation for example).
- **Consider ways in which the Year and associated decision-making processes and design and delivery procedures might be formalised and professionalized**, for example through standing guidance and centralised coordination by a single DG (DG COMM) or the Secretariat General, and by including a strong role for the European Parliament, The European Economic and Social Council, the Committee of Regions and the EU Representations in Member States;
- **Carry out a robust and systematic ex-ante assessment of the Year**, also including some form of empirical research/mapping of actors that are interested in the proposed theme and can potentially mobilise resources. The EY2012 was preceded by an extensive consultation where respondents were also asked about their potential contribution to the EY and that paved the way for their subsequent mobilisation. This could be repeated and strengthened for instance by opening a consultation on competing potential EY2012 themes, where interested stakeholders could propose in advance their commitment by responding to a structured questionnaire. EC representations and relevant EU policy committees should be involved in this process as well.
- **Consider choosing the theme in such a way that it is possible to exploit connections with the preceding and subsequent Years**. In the case of the EY2012, there was the advantage of working with overlapping groups of stakeholders. Moreover, the national teams were sometimes very close to those who had implemented the EY2011 and this facilitated the transmission of lessons. With thematic continuity, it is also possible to have the subsequent Year launched at the final event of the current Year in the presence of a relevant audience. Of course the search for continuity should not be to the detriment of the relevance of the theme and should not restrain from choosing innovative and least explored themes. In any case, the ex ante assessment could investigate if and how continuity with the previous and following Year can be exploited at EU and country level.

The evaluation also highlighted that a smooth and timely decision-making process is key. Certain initiatives lost momentum due to the belated **decision** approval. Also, certain EU level networks could have conveyed the message more systematically to their membership with an earlier decision. Drawing on these lessons, the EC, in agreement with the European Parliament, could take the following steps.

- **Commit to the EY process well ahead of time**, to allow for effective engagement of Members of Parliament, regional and local stakeholders and early establishment of the website.
- **Aim for the timely approval of the decision** (ideally one year in advance), or if this is difficult to achieve, prevent the impact of the late publication of the decision of implementation, especially in terms of contracting matters.
- **Consider outsourcing communication services under a main framework contract** for a multiple number of European Years. Having a contractor specialised in EYs allows experience and knowledge to be built on typical formats of activity of the European Years, lessons to be learnt and the establishment of a cooperation network with EC representations in Member States.
- **Ensure that cooperation is established among relevant services early enough** to allow spending programmes, and notably calls for proposals, which take into account the theme of the EY. In the EY2012 for example, early cooperation allowed the inclusion of a reference to active ageing in the call for proposals published under the Social Dialogue budget line. To have relevant projects implemented during the European Year, cooperation needs to be established two years in advance (so that calls for proposals can be launched one year in advance). This means that ideally the theme of the Year would also need to be known two years in advance.

### Set up and implementation

The **collaboration between EC team and National Coordinators** was smooth during this Year and the mechanisms set up for this cooperation represent a good practice example. The qualities and level of commitment of National Coordinators were also crucial and made a difference in the attainment of certain target groups in some countries. At the same time, the Year also had a strong regional dimension. In setting up the governance structure and programme for the Year, the EY team, in agreement with participating countries, could take the following actions:

- **Create a stimulating mutual learning environment among National Coordinators** and between coordinators and Stakeholders, through periodic face-to-face meetings and regular communication in between meetings. The evaluation showed that regular face-to-face meetings of national coordinators with the EC team and communication contractor allows less experienced country officers to learn from the most experienced ones and facilitates cooperation at country level. Moreover, convening joint meetings of National Coordinators and EU stakeholders improves the coordinated cooperation between governments and civil society at country level.
- **Provide the option of developing regional programmes** where for any reason a National Programme cannot be developed, and sensitise the Committee of Regions and organisations of regional and local authorities in time, so that they have time to mobilise their members.
- **Encourage participating countries to pay particular attention to the personal qualities and skills of National Coordinators** – leadership, being known by stakeholders and having contacts across a range of relevant policy departments.

The choice of initiatives at EU level proved adequate in general, but the EU Awards did not all have the same rate of success. To maximise the impact of the Year, the EC could in future Years:

- **ensure strong partnerships are secured on EU awards well in advance**, and exploit key intermediaries and existing dissemination channels, recognising that this requires planning well ahead of time;
- learn from the success of Generations@school, and **prioritise activities with local implementation and impact, but with a transnational dimension** (e.g. award, exchange visit,



etc.); activities that are similar to what has already been done but in which the EU context adds some clear added value to participants.

The website was a powerful instrument for the Year, but the evaluation highlighted the need for better data on website access and more effective links between the EU level and national level management of websites and social media accounts. Also, the communication contractor appeared to have responsibility for the input/contents of the website but not really for the final outcomes of web and social media activity (that was run by the EC). In this respect, for the next Years the EC could:

- **make sure that the communication contractor also has targets related to the outreach of web and social media activities**, not only at EU level but also at country level if possible, via national correspondents providing technical assistance to National Coordinators (this was done in this Year for traditional media activity, could be extended in scope); a communication contractor with national correspondents could also keep a better overview of the overall social media impact of the Year;
- **improve ongoing monitoring of the outreach to the general public through the website**, by collecting more detailed website statistics (e.g. collect data on the country of origin of visitors via IP addresses; consider asking to register for the download of important materials or publications; etc.).

EY2012 demonstrated that it is possible to achieve good results without allocating a specific **budget** to Member States. In the next EYs, the EC could continue the approach of not providing separate grant funding for projects in Member States during the Year, advise on the use of existing funding instruments to support the theme of the Year, and provide assistance through the communication contractor and EC representations. The choice of providing grant funding only *after* the end of the Year, to develop comprehensive strategies on active ageing using the momentum created by the Year, represents an interesting choice to the Commission for the EY2012 that could be replicated.

#### Follow-up

The follow-up of a European Year is important to ensure lasting effects. A specific **legacy strategy** should be designed by the responsible DG preferably at the beginning, but at the latest before the end of the Year, to ensure that the built momentum be supported and accommodated by appropriate EU programmes and policy initiatives.



# 1 Introduction

## 1.1 Purpose of the evaluation

With the request for service n. 059 - VT/2012/082 ECORYS Nederland was entrusted by the European Commission DG Employment, Social Affairs and Inclusion to conduct the ex-post evaluation of the European Year for Active Ageing and Solidarity between Generations (hereafter the 'EY2012' or 'the Year')<sup>9</sup>.

The evaluation exercise lasted twelve months (from January 2012 to December 2013). Its **purpose** was to undertake 'an overall assessment of the initiatives provided for in the Decision with details of implementation and results'<sup>10</sup>. The evaluation will furthermore be used as basis for a report to be submitted by the European Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions.

The evaluation is expected to address the following **issues**:

- whether and to which extent the EY2012 has met its objectives, at both European and national levels;
- the EU added value of organising a specific European Year in this particular field, taking into consideration existing European Union initiatives and measures to promote ageing and solidarity between generations;
- an overview of the initiatives provided during the EY2012 at the EU, national, regional and local level, with details on implementation and results as well as an identification of particularly successful initiatives;
- an assessment of how gender equality has been mainstreamed in the initiatives of the European Year and how the accessibility of those initiatives for persons with disabilities has been ensured;
- as assessment of the extent to which the European Year has produced lasting effects in terms of promoting active ageing across the Union (taking into account the particular challenges brought about by the current economic and financial crisis);
- lessons that can be learnt for future European Years, notably in the area of social policy, and for future Union policies, measures and actions in the area of active ageing and solidarity between generations.

The evaluation applies the criteria of relevance, effectiveness and impact, complementarity, efficiency, sustainability. In addition it covers mainstreaming of gender and social inclusion (accessibility) issues, implementation and delivery mechanisms.

Regarding the **geographical scope**, the evaluation covers the EY2012 participating countries (all EU Member States except for Croatia, plus Iceland, Liechtenstein and Norway).

Finally, as far as the **time scope** is concerned, activities considered are principally those implemented in 2012. Whenever needed, we take into account the preparations in 2011 and the follow-up in 2013.

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<sup>9</sup> The evaluation team was led by Alessandra Cancedda (project director) and Neil Mc Donald (deputy project director), and composed also of Thijs Viertelhuizen, Annemieke Pickles, Dennis Van Buren, Mike Blakemore, Marjolein Peters. Laura Veart cooperated in the case studies.

<sup>10</sup> Request for services, p. 1.

## 1.2 Evaluation questions

The **evaluation questions** reflect the multiple purposes of the assessment and are formulated as follows:

### 1.2.1 *Relevance*

EQ1 - How relevant was the initiative to organise a specific European Year for the promotion of active ageing and solidarity between generations?

EQ2 - How relevant were the EY2012's objectives, thematic priorities and types of initiatives?

### 1.2.2 *Effectiveness and impact*

EQ3 - To what extent did the EY2012 deliver the expected results?

EQ4 - Which target groups were reached best? At which level?

EQ5 - What were the main impacts of the EY2012?

EQ 6 - How and to which extent did major European events contribute to achieving the EY2012s objectives?

### 1.2.3 *Complementarity*

EQ7 - How complementary was the EY2012 with regard to other EU policies or policies in the Member States in the context of active ageing and solidarity between generations?

### 1.2.4 *Efficiency*

EQ8 - Was the EY2012 implemented efficiently or could better results have been achieved with the available resources (human and financial) at the EU level?

### 1.2.5 *Gender and social inclusion mainstreaming*

EQ9 - How and to what extent was the gender dimension taken into account in initiatives, at EU and national level?

EQ10 - How and to which extent was the accessibility of the activities ensured for persons with disabilities?

### 1.2.6 *Implementation and delivery mechanisms*

EQ 11 - How relevant and effective were the management structures and delivery mechanisms at EU and national levels? Could alternatives be envisaged?

EQ 12 - How, and how effectively, have relevant stakeholders (regional, national authorities and NGOs and social partners) been involved (at the EU and national levels)?

### 1.2.7 *Sustainability*

EQ 13 - To which extent is the EY2012 likely to provide a lasting effect?

EQ 14 - Which type and area of initiatives, delivery mechanisms and stakeholders involvement were particularly successful in providing lasting effects?

EQ 15 - What recommendations can be drawn with regard to 1) active ageing measures and actions and 2) future European Years?

### 1.3 Methods for data collection

During the inception phase, an evaluation framework was developed, articulating these questions in sub-questions, indicators (quantitative, but more often qualitative), sources and tools. The framework is provided in Annex III.

#### 1.1.1 *Participation in the Meeting of National Coordinators and of the EU Stakeholders' Coalition organised by the EC – 20-21/2/2013*

The evaluation team participated in the final Meeting of National Coordinators and of the EU Stakeholders' Coalition that was organised by the Commission on 20-21 February 2013. Contacts were made with all relevant stakeholders and the team could explain the evaluation methodology and workplan. By listening at presentations the team could also gather preliminary information on the outputs and outcomes of the Year.

#### 1.1.2 *Desk research*

A number of EU documents and reports were gathered in March-April 2013 and organised according to the chronological phase of the Year they referred to and the theme. The gathering of these documents was undertaken primarily through a daily tracking of material that comes through the EU Newsroom at [http://europa.eu/newsroom/index\\_en.htm](http://europa.eu/newsroom/index_en.htm). This was supplemented by material produced in a range of key media outlets. These documents provided useful information on EU level activities, policy processes and policy outcomes of the Year and were used for the drafting of this report in November 2013.

Moreover, we reviewed the national work programmes and the available national evaluations; checked for additional information on national websites; analysed the initiatives database on the EU website by country; examined press coverage data by country. A first review of documents was conducted in April and a further analysis of the database of initiatives was conducted in October. A grid based on the evaluation framework was used to extract relevant information.

#### 1.1.3 *Survey with National Coordinators*

An on-line survey with National Coordinators took place between February and July 2013. The survey questions intended to generate input for all evaluation criteria and especially on the organisation and implementation of the Year in the countries. The non-EU Member States were not included because of their minor involvement in the Year. The survey was conducted by sending personalised invitations to National Coordinators. Of the Member States, all completed the survey except for Latvia which did so partially and Ireland which did not fill the questionnaire. In both cases the reason was the unavailability of the relevant contact persons due to staff turnover.

#### 1.1.4 *Interviews with EU level key informants and the communication contractor*

To obtain an overview of key issues and achievements of the EY2012 we conducted interviews with key informants from EU level organisations involved in the Year. The interviews were held in the months of May, June and October by senior team members. A semi-structured questionnaire was used, also as a reporting template. Interviews were prevalently done face-to-face, and just in few cases over the phone to overcome otherwise unsolvable agenda problems. Interviews were also conducted with representatives of the communication contractor, to collect relevant information on their activities and get their views on the implementation of the Year at EU and country level.

### 1.1.5 Survey with national stakeholders

An on-line survey among stakeholders in the EU Member States allowed to capture the experience and views of the most concerned categories of stakeholders of the Year. It collected information that is supplementary to the information retrieved from the National Coordinators and balanced the authorities' view with the view of civil society on the achievements of the EY2012. Categories of the EY2012 stakeholders that participated in the survey included regional and local authorities, trade unions, employers, civil society organisations (NGOs), the media, EC representations and other organisations like semi-state agencies. The panellists were identified by collecting contacts from a number of EU level networks and by searching contact details on the organisations' websites. The survey was carried out in the months of June and July 2013 and focused on the evaluation criteria relevance, effectiveness and sustainability.

A total of 111 stakeholders completed the survey completely, one respondent above target, with an overall response rate of 22,8%. The proportion of the different categories among the stakeholders who completed the survey were similar to those originally intended, with a larger share of civil society organisations and regional or local authorities (or association thereof), and lower quotas of employers associations, trade unions, media organisations and EC representations.

### 1.1.6 Social media analysis

In May-July 2013, we conducted an analysis of social media activity initiated by the European Commission on Twitter and Facebook. Based on what was available, collected data included items such as:

- Total number of people reached (Facebook and Twitter);
- Total number of people talking about or replying to each message (Facebook & Twitter);
- Total 'likes' (Facebook);
- Total number of shares (Facebook and Twitter);
- Percentage of engagement (Facebook).

All of this data were analysed based on the time they were posted, thereby highlighting the kind of message and when a wide audience was reached.

### 1.1.7 Case studies

In November 2013 we completed the collection of evidence with three case studies. We opted for one activity case study and two country case studies.

The activity case study was focused on the Generations@school initiative. We choose it because it was a new format of activity for a European Year that had success and could therefore yield lessons for the future implementation of similar initiatives.

The two country case studies were chosen for different reasons:

- Poland was chosen because of the policy outputs that could be associated with the Year, notably the Programme for Senior Citizens Social Activity. We wanted to assess to what extent these policy outputs were affected by the EY2012 and the mobilisation of actors was sustaining the success of such initiatives.
- Portugal was chosen as one of the most active countries and because the strong regional and local dimension of the Year represented an interesting feature.

Besides testing specific hypotheses related to the distinctive features of the Year in the country, the case studies collected information on effectiveness, complementarity, sustainability, gender and accessibility mainstreaming.

The methods that were used to collect data for the evaluation are summarised in the following table.

**Table 1-1 Methods and sources for the evaluation**

Method	Sources
Desk research and social media analysis	<ul style="list-style-type: none"> <li>• Key EU documents of the EY2012;</li> <li>• EU Policy documents related to active ageing;</li> <li>• EY2012 website;</li> <li>• Social Europe Facebook page and Twitter account;</li> <li>• National programmes;</li> <li>• National evaluations, where available;</li> <li>• National websites;</li> <li>• Lists of projects and other documents provided by NCs.</li> </ul>
Web-based surveys	<ul style="list-style-type: none"> <li>• National stakeholders survey (111 respondents, of which 33 civil society organisations, 32 regional or local authorities, 12 employers' associations, 12 EC representations, 10 media organisations, 10 trade unions, 2 semi-state agencies);</li> <li>• National Coordinators Survey (27 respondents).</li> </ul>
Interviews	<ul style="list-style-type: none"> <li>• EU Officials (13), EU Stakeholders (11).</li> </ul>
Case studies	<ul style="list-style-type: none"> <li>• Activity case study on Generations@school (desk research, interviews with representatives of 9 schools from Austria, Bulgaria, France, Ireland, Italy, Poland and Portugal );</li> <li>• Country case studies: Poland, Portugal (desk research, interviews with NC and stakeholders).</li> </ul>
Other	<ul style="list-style-type: none"> <li>• Participation in the Meeting of National Coordinators and of the EU Stakeholders' Coalition organised by the EC – 20-21/2/2013.</li> </ul>

A few changes were necessary with respect to the original plan as set in the inception report:

- Originally, it was planned to undertake the survey with national stakeholders via email and by telephone. Because of the size of the sample and a number of difficulties the above format would generate for analysing the response, we subsequently opted for an online survey. To keep the number of questions as limited as possible as it is advisable in online surveys, we chose to restrict the focus on the three criteria on which we thought the national stakeholders could provide more credible information i.e. relevance, effectiveness and sustainability.
- In the inception report, we had also foreseen a survey among project promoters (organisations leading the initiatives mentioned in the EU online database). At the end of the interim phase we found that, on the one hand, the two surveys on National Coordinators and national stakeholders together with the findings from the desk research already provided a convincing and balanced picture. On the other hand, we felt that more valuable and innovative insights would be gained from exploiting more the existing evidence. We therefore agreed with the Commission to skip this survey and use the resources to strengthen the case studies.

The application of several different research methods – qualitative and quantitative - and the consultations with several types of stakeholders allowed us to draw lessons on the general trends of the Year in the 30 participating countries as a whole. It was not the purpose of this evaluation to assess the outcome of the Year in the individual countries. This has been done by a number of NCs

through their national evaluation exercises<sup>11</sup>. Material collected for the countries case studies was used to increase opportunities for exemplifying particular issues or aspects of the Year.

Taking these points into account, we consider that on balance the methodology that was applied and the evidence base that was available did allow for a robust assessment to be made of activities, immediate outputs and intermediate outcomes; and to begin to highlight areas where medium-term effects can be predicted with reasonable certainty.

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<sup>11</sup> Año Europeo del Envejecimiento Activo y de la Solidaridad Intergeneracional 2012 Resultados del Programa de actividades en España, Informe Final; Europejski Rok Aktywności Osób Starszych i Solidarności Międzypokoleniowej 2012 w Polsce, Raport ewaluacyjny, Warszawa, luty 2013; European Year for Active Ageing and Solidarity between Generations Assessment Report, 2012 - Portugal, March, 2013; Európsky rok aktívneho starnutia a solidarity medzi generáciami 2012 Záverečná správa (marec 2013); briefing notes from UK and Czech Republic on follow-up activities.

## 2 Overview of the European Year 2012

### 2.1 Introduction

In this section we reconstruct the Year in terms of key activities and events and most significant outputs produced. We focus first on the EU-level programme implemented by the European Commission team, in cooperation with the Communication Contractor and in partnership with several institutions and stakeholders. Then, we examine the implementation of the Year in the participating countries, in terms of involvement in the EU programme and organisation of independent initiatives.

### 2.2 The Year and its policy context – an annotated chronology

For the desk research at EU level a number of documents and reports were gathered and organised chronologically and the theme. The gathering of EU documents was undertaken primarily through the daily tracking of material that comes through the EU Newsroom<sup>12</sup> and through the websites of the individual DGs. This was supplemented by material produced in a range of key media outlets.

At the European level there was significant and coordinated preparation for the Year. For example it was contextualised by detailed multi-lingual background media information, a full Eurobarometer Survey with detailed country factsheets, and a dynamic and informative website which was widely accessed during the year (although a site check on 2 October 2013 showed that activity in populating the website with current information had largely stopped as of March 2013, and some links were not functioning). During the Year itself further statistical evidence was provided, including the budgetary implications of ageing, background statistics to inform the healthy ageing initiatives, labour market participation statistics, and national level detailed analyses that set national ageing issues into the wider European context. In addition, key publications and policy developments from the EU identified the pan-European context relating to the Year itself, the developing European Innovation Partnership on Active and Healthy Ageing, the Horizon 2020 research programme, and critical issues such as the impact of ageing on the European pensions systems.

The chronology and key features of the preparation and implementation phases of the EY2012 are now considered in more detail.

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<sup>12</sup> [http://europa.eu/newsroom/index\\_en.htm](http://europa.eu/newsroom/index_en.htm)

### 2.2.1 Preparation period

The table below sets out the key documents produced during the run-up to the Year. This includes a number of early sources that formed part of the evidence supporting the rationale for the Year.

**Table 2-1 EU documents relevant to the EY2012, up to December 2011**

Date	Type	Description	Reference
2006-2009	A developing policy and evidence basis	Focus on life-long learning and adult learning, ageing societies and ICT use, active ageing, social ethical and privacy needs in ICT for older people, and a developing Social Agenda.	( <a href="#">Ala-Mutka and Punie 2007</a> ; <a href="#">Empirica 2008</a> ; <a href="#">EUPARL 2006</a> ), ( <a href="#">EUROPE 2008a</a> ; <a href="#">EUROPE 2008b</a> ; <a href="#">Malanowski, Ozcivelek, and Cabrera 2008</a> ; <a href="#">SENIOR 2008</a> )
2009-2010	Policy Development	2009 Ageing Report with budgetary projections for Member States, consultation about the proposal for the European Year for Active Ageing and Intergenerational Solidarity ("Year"), and a policy focus on healthy ageing.	( <a href="#">EUROPE 2009a</a> ; <a href="#">EUROPE 2009b</a> ; <a href="#">Geoghegan-Quinn 2010</a> ; <a href="#">PEROSH 2009</a> )
June 2010	Institute of Prospective Technological Studies (IPTS)	Conclusions of the Workshop on Long-term Care Challenges in an Ageing Society: the Role of ICT and Migrants.	( <a href="#">Redecker and Centeno 2010</a> )
	Policy	European high-level panel consults on ICT solutions to help the elderly to live more independently.	( <a href="#">EUROPE 2010d</a> )
	Policy	European Council conclusions on Active Ageing.	( <a href="#">EUROPE 2010b</a> )
July 2010	Policy	Launch of public debate (Green Paper) towards adequate, sustainable and safe European pension systems.	( <a href="#">Andor 2010a</a> )
	Policy	Opportunities and Challenges of Demographic Change in Europe.	( <a href="#">Andor 2010b</a> )
September 2010	Planning for the Year	Commission Staff Working Document Ex-Ante Evaluation Accompanying document to the Decision of the European Parliament and of the Council on the European Year for Active Ageing (2012).	( <a href="#">EUROPE 2010a</a> )
	Research and Policy	Digital Technologies for Ageing Well - the European Union Strategy from Research to Reality.	( <a href="#">Kroes 2010a</a> )
November 2010	Research and Policy	Launch of the Innovation Union Partnership on Active and Healthy Ageing.	( <a href="#">EUROPE 2010g</a> ; <a href="#">EUROPE 2010h</a> ; <a href="#">Kroes 2010b</a> )
	Ageing	European Economic and Social Committee - EESC Design Eleven "Ageless Design – Design for all generations".	( <a href="#">EUROPE 2010f</a> )
December 2010 and May 2011	Research and Policy	Evaluation of the Ambient Assisted Living initiative for 'ageing well', Council focus on ageing and the labour market, and evidence of SME support for ICTs for elderly people.	( <a href="#">EUROPE 2010c</a> ; <a href="#">EUROPE 2010e</a> ; <a href="#">EUROPE 2010i</a> ; <a href="#">EUROPE 2011d</a> )



Date	Type	Description	Reference
		Council conclusions in May 2011.	
2011	Policy	European Agency for Safety and Health at Work – “Promoting active ageing in the workplace”.	(Ilmarinen 2011)
January 2011	Research	ICTs for elderly and disabled to manage their lives independently at home.	(EUROPE 2011h)
March 2011	Policy	Council Conclusions on preparatory work for the pilot European Innovation Partnership "Active and Healthy Ageing".	(EUROPE 2011c)
	Year	Parliament adopts Employment Committee's report: 2012: European Year for Active Ageing ... and Solidarity between Generations.	(EUPARL 2011a)
	Evidence	Commission launches Survey of Health, Ageing and Retirement in Europe (SHARE).	(EUROPE 2011n)
	Policy	EESC held a hearing on 'The role of family policy in demographic change: Sharing best practice among Member States'.	(EUROPE 2011k)
April 2011	Policy	Hungarian Presidency focuses on demographic change - Informal Meeting of Ministers for Demography and Family Policy Issues.	(EUROPE 2011e)
	Year	Towards the European Year for Active Ageing and Solidarity between Generations (2012) Conference.	(Kroes 2011)
May 2011	Research and Policy	Council endorsement: Pilot European Innovation Partnership on Active and Healthy Ageing.	(EUROPE 2011a; EUROPE 2011l)
July 2011	Policy	Commission Recommendation: More years, better lives - the potential and challenges of demographic change.	(EUROPE 2011f)
September 2011	Research	The Pilot European Innovation Partnership on Active and Healthy Ageing (AHA): First experiences on governance and processes.	(EUROPE 2011m)
	Policy	Parliament: Call for better support for female entrepreneurs and over-50s returning to work.	(EUPARL 2011b)
	Policy	Agreement to launch the Joint Programming Initiative on 'More Years, Better Lives' at the EU's Council of Ministers on Competitiveness on 30th September.	(EUROPE 2011g)
November 2011	Research and Policy	Steering Group of the pilot European Innovation Partnership on Active and Healthy Ageing agreed on joint actions in response to the societal challenge of an ageing European population.	(EUROPE 2011i)
December 2011	Policy	Ageing as an opportunity for the labour market and for the development of social services and community activities - Council conclusions.	(EUROPE 2011b)
	Year	Commission: 2012 is the European Year of Active Ageing and Solidarity between Generations.	(EUROPE 2011j)

Well in advance of the EY2012, a series of research reports at EU level started to highlight the emerging issue of demographic change. The issue was also highlighted at a strategic policy level by the 2007 Council Resolution on "Opportunities and challenges of demographic change in Europe: the contribution of older people to economic and social development", which emphasized the need to strengthen older persons' resources and potential for active participation in society as a whole. Intergenerational solidarity was also identified as a specific policy issue several years in advance of the EY2012 – for example through the "Intergenerational Solidarity for Cohesive and Sustainable Societies Conference", held during the Slovenian Presidency in 2008, which stressed the importance of intergenerational solidarity and called for a European Year on the issue.

In 2009 (so three years before the EY2012) the Ageing Report, prepared by the DG for Economic and Financial Affairs, presented projections of the budgetary impact of the ageing population in the 27 EU Member States over the period 2008-2060. Although pointing out the challenge facing policy-makers, particularly in economic terms, the report also pointed out that: *"...being active, healthy and participative well into old age is now a realistic prospect for very large numbers of citizens for the first time in European history"*. A European Day on Solidarity between Generations was held in April 2009. Also in 2009 a public consultation was launched on a possible designation of 2012 as the European Year for Active Ageing and Intergenerational Solidarity. This noted strong support from stakeholders (although the number of responses was relatively low (132) many were from representative bodies, civil society organisations in particular).

Subsequent reports and reflections provided more background evidence on the importance of ageing as an issue in the EU and on potential solutions (particularly concerning the role of ICT). Much of the evidence also focused on some of the more positive aspects of ageing; the potential contribution of older people and counter-balancing negative stereotypes. The Council Conclusions on Active Ageing (2010) consolidated previous evidence, invited Member States to make active ageing a priority, and invited the Commission to pursue the preparation of a European Year for Active Ageing in 2012, highlighting the benefits of active ageing and its contribution to solidarity between generations.

Specific planning activity for the EY2012 itself began in September 2010 with the ex-ante evaluation to accompany the Council Decision on the Year (which links the Year specifically back to the call from the Slovenian presidency in 2008). This document drew on further stakeholder consultations, as well as the results of the evaluations of previous European Years<sup>13</sup>. At that time it identified the three main challenges as: tackling early retirement; combating isolation of older people; and tackling ill health in older age. While highlighting continuing EU policies on employment, volunteering, healthy ageing, age discrimination, infrastructure and autonomous living; the need for further action was based on the identification of a number of gaps. These gaps were formalised in terms of insufficient awareness amongst the general public, policy makers and other stakeholders of the importance of active ageing; the need to better mobilise the potential of the baby-boom cohorts; to foster exchange of information and experience between Member States and stakeholders; and to give Member States and stakeholders an opportunity to develop policies further through specific activities and by committing to specific objectives. It concluded that: *"A European Year for active ageing could provide an appropriate framework for action to be taken at local, regional and national level as well as for transnational projects. It could also provide the political momentum and visibility needed to promote active ageing policies, especially those to develop the potential of the baby boom cohorts"*.

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<sup>13</sup> Although only those led by DG EMPL.

The preferred option identified was “...a European Year without a specific budget coordinated and centralised by the Commission”. In terms of objectives, the ex-ante assessment suggested the European Year:

“... should be seen as the highlight of a major effort spanning the period 2011-2014 during which the EU would focus many of its existing programmes and policies on the issue of active ageing and put in place a framework in which new initiatives and partnerships supporting active ageing at all levels (Member State, regional, local, social partners, civil society) can be encouraged and publicised”.

In terms of the potential added value of the EY2012, volume (stimulating further action), scope (mainstreaming), role (innovation and policy transfer between different areas) and process (improved administration of programmes) effects were to be targeted.

Additional research and policy development followed, including a range of activities around digital technologies and assisted ambient living; design for ageing, the Innovation Union Partnership on Active and Healthy Ageing; independent living and active ageing and employment. In March 2011 the Parliament adopted the Employment Committee's report on the 2012: European Year for Active Ageing and Solidarity between Generations. Policy activity continued throughout 2011, with the further development of the Innovation Partnership on Active and Healthy Ageing, and the launch of the Joint Programming Initiative on 'More Years, Better Lives', addressing the potential challenge of demographic change and ageing for labour market and social services development.

### 2.2.2 Implementation period

The table below sets out the main policy documents produced during the Year itself.

**Table 2-2 EU documents relevant to the EY2012, from January 2012**

Date	Type	Description	Reference
2012	Year and evidence	Examples of specific research related to the Year.	(ASTON 2012; Deeg and Wahl 2012; EIU 2012; EUGMS 2012; Walker and Maltby 2012; WCAA 2012)
	Year	Join the <u>Generations@school</u> project!	(eTwinning 2012)
	Evidence	OECD in collaboration with the EU: Policy Brief on Senior Entrepreneurship: Entrepreneurial Activities in Europe.	(OECD 2012)
January 2012	Year	<u>Commission launches the Year</u> – Opening Conference and the Commissioner launch activities.	(Andor 2012a; Andor 2012e; EUROPE 2012q)
	Year and evidence	Eurobarometer released on Active Ageing.	(EUROPE 2012b; EUROPE 2012h; EUROPE 2012i)
February 2012	Year	Irish Presidency highlights the Year.	(Connolly 2012; Higgins 2012)
	Year	Foci on learning and the Innovation Partnership.	(EUROPE 2012p; Vassiliou 2012)
April 2012	Policy	Highlighting the health ageing issues.	(EUROPE 2012n; Kroes 2012b)
May 2012	Evidence	The 2012 Ageing Report: Economic and budgetary projections for the 27 EU Member	(EUROPE 2012a)

Date	Type	Description	Reference
		States (2010-2060).	
	Policy	Feasibility of an Electronic Platform for Adult Learning in Europe.	(GHK 2012)
	Policy	Council conclusions on the sustainability of public finances in the light of ageing populations.	(COE 2012)
June 2012	Year	More than 160 representatives from national governments, regional and local authorities, social partners and other relevant stakeholders participated in the conference " <u>Good Governance for active and Healthy Ageing</u> ", which took place in Brussels on 4 June organised by the European Commission's Directorate General for Employment, Social Affairs and Inclusion.	(EUROPE 2012e)
	Research and Policy	Efforts to increase the healthy lifespan of EU citizens by two years received a major boost as 261 projects were submitted for inclusion in the European Innovation Partnership for active and healthy ageing. The partnership brings together more than 50 regions, technology companies and health providers.	(EUROPE 2012i)
July 2012	Evidence and Policy	Health in the EU. What is in there for you? Recent Achievements.	(EUROPE 2012o)
	Policy	On Thursday 12 July, the European Economic and Social Committee adopted two opinions on sensitive topics that are at the heart of the debate across Europe: the future of the pension systems and employment for young people. In both cases, the Committee reached a compromise solution and thus established its position for the future debate on two issues that are so vital to the idea of social Europe.	(EESC 2012)
September 2012	Policy	Ageing teachers a challenge for EU education sector.	Ageing teachers a challenge for EU education sector
	Policy	Promoting employment and participation in society of older people – a challenge for the next 50 years. The United Nations Economic Commission for Europe (UNECE) Ministerial Conference on Ageing / Vienna, 20 September 2012.	(Andor 2012d)
	Policy	2012 <u>Vienna Ministerial Declaration</u> : Ensuring a society for all ages: Promoting quality of life and active ageing.	(UNECE 2012)
October 2012	Year	A positive approach to ageing.	(Andor 2012c)
	Year	<u>Seniorforce Days</u> staged in 25 countries across Europe to celebrate the power of	(EUROPE 2012r)

Date	Type	Description	Reference
		senior volunteering European Seniorforce Day events were staged across all Member States around October 1, the International Day of Older Persons, as a way to engage and harness the power of senior volunteers.	
November 2012	Year	First Conference of Partners of the European Innovation Partnership on Active and Healthy Ageing.	( <a href="#">EUROPE 2012d</a> ; <a href="#">Kroes 2012a</a> )
	Year	<u>Awards Ceremony</u> . Winners of a competition to promote active ageing. There were six categories of winners in the competition, selected from over 1300 submissions, which was organised as part of the European Year 2012 for Active Ageing and Solidarity between Generations. Categories: Intergenerational encounters in schools, Journalism (written and audio visual), Individual life-time achievements, Social Entrepreneurship, Age-Friendly Environments, Workplace for all Ages.	( <a href="#">EUROPE 2012c</a> ; <a href="#">EUROPE 2013b</a> )
December 2012	Evidence	<u>Launch of the Active Ageing Index</u> 2012 for 27 EU Member States. The AAI is a newly developed tool that offers national and European policy-makers a way to measure and promote the untapped potential of the older population. In its design, the index follows the conceptual framework of the 2012 European Year for Active Ageing and Solidarity between Generations (EY2012). It makes use of a dashboard of diverse indicators, organised under four distinct domains: (1) Employment of older workers; (2) Social activity and participation of older people; (3) Independent and autonomous living of older persons; and (4) Capacity and enabling environment for active ageing.	( <a href="#">Zaidi et al. 2012</a> )
	Year	<u>Closing Seminar of EY 2012</u> for active ageing and solidarity between generations.	( <a href="#">Andor 2012b</a> )
	Year	United Nations Regional Information Centre for Western Europe - Active ageing, the assets of an ageing population.	( <a href="#">UNRIC 2012</a> )
	Year	<u>Closing Conference in Nicosia</u> , and related material and publicity.	( <a href="#">AGE 2012</a> ; <a href="#">EUROPE 2012k</a> ; <a href="#">EUROPE 2012m</a> ; <a href="#">EUROPE 2012l</a> )
	Year and Policy	Council Declaration on the European Year for Active Ageing and Solidarity between Generations (2012): The Way Forward. The Council of the European Union adopts the Guiding Principles for Active Ageing and Solidarity between Generations.	( <a href="#">EUROPE 2012f</a> ; <a href="#">EUROPE 2012g</a> )

Date	Type	Description	Reference
January 2013	Year	Scotland, UK: PATH to Active Ageing: Promoting the Benefits of Physical Activity for Older People Sharing Learning and Knowledge in Scotland in the European Year for Active Ageing 2012.	( <a href="#">SCOTLAND 2013</a> )
	Policy	EU Entrepreneurship Action Plan: Foster senior entrepreneurs interested in transferring know-how and match senior with inexperienced entrepreneurs. Ensure that the participation of senior entrepreneurs and retired executives does not affect their pension prospects.	( <a href="#">EUROPE 2013c</a> )
	Policy	The role of pension funds in active ageing and solidarity between generations.	( <a href="#">Andor 2013b</a> )
February 2013	Policy	Social Investment Package. "Member States need to shift their focus to investment in human capital and social cohesion".	( <a href="#">Andor 2013c</a> ; <a href="#">EUROPE 2013d</a> ; <a href="#">EUROPE 2013e</a> ; <a href="#">EUROPE 2013f</a> ; <a href="#">EUROPE 2013g</a> )
March 2013	Policy	Focus on the stability of pensions systems and standard of living for all.	( <a href="#">Andor 2013a</a> ; <a href="#">EUPARL 2013</a> )
May 2013	Policy	Elderly entrepreneurs: Innovation isn't just for the young.	( <a href="#">Kroes 2013</a> )
June 2013	Research and Policy	EU Summit on Active and Healthy Ageing: An Action Agenda for European Cities and Communities.	( <a href="#">Geoghegan-Quinn 2013</a> )
July 2013	Research and Policy	Active & Healthy Ageing: EU cities and regions get star ratings to recognise excellent projects. 32 cities and regions across Europe have been rewarded for new ways of helping older people. These award-winners have been implementing innovative technological, social or organisational solutions to enhance the efficiency of health and social care systems.	( <a href="#">EUROPE 2013a</a> )

These documents provide a benchmark showing the development and communication of EU level activities and policy processes, and they start to indicate the policy outcomes of the Year. However, such information can be used only in conjunction with other sources that more directly match the evaluation questions.

The Year had the potential to touch on a great majority of the policy areas across the European Commission and its Member States. There was therefore a difficult balance to be achieved between covering the maximum number of policy areas (and spreading the initiative too thinly) or missing critical areas (and missing out on achieving important potential impacts).

Therefore there needed to be a clear organising framework which came first through the formal establishment of the Year, and then in more detail through the EU Innovation Partnership with its three core objectives. Throughout the Year the Commission maintained a regular policy momentum, starting with work on pensions reforms, then looking at social investment (providing a context for example for a focus on voluntary activities, social intermediaries, and the role of unpaid

carers), and helping to move the labour market debate away from jobs for elderly people to focus on the elderly as entrepreneurs. This crucially acknowledges elderly people as major repositories of knowledge and skill, rather than just being workplace resources.

The need to measure and benchmark activities related to ageing led to the launch of the first 'Active Ageing Index'. There was also continuity into the following European Year of Citizens, through the European Day of Solidarity between Generations on 29 April 2013<sup>14</sup>.

## 2.3 The EU-wide programme

The Year saw a regular series of European events:

- Opening event of the EY2012 in Copenhagen;
- Closing event of the EY2012 in Nicosia;
- Journalists Conference;
- Conference on good governance for active and healthy ageing;
- Generations@school Project and award (420 schools participating);
- Senior Force Days;
- Awards (Journalist award, Life story challenge award, Workplaces for all ages award, Towards age-friendly environments award; 1386 candidature submissions in total).

Moreover, two important outputs of the Year were:

- the Active Ageing Index;
- the Guiding Principles for Active Ageing and solidarity between generations<sup>15</sup>.

### 2.3.1 Conferences and events

Entitled "*Stay Active – what does it take*", the **opening event** took place in Copenhagen on 18-19 January 2012, under the auspices of the Danish EU Presidency. The opening speeches were given by Mette Frederiksen, Danish Minister for Employment, and Mr László Andor, the EU Commissioner responsible for Employment, Social Affairs and Inclusion. The two-day programme<sup>16</sup> included presentations by Mr John Dalli, EU Commissioner for Health and Consumer Policy and the President of AGE Platform Europe. Sessions addressed a range of themes including labour market issues, staying active and healthy, inclusion and empowerment, innovation and volunteering. The event was closed by the Danish Minister for Social Affairs and Integration.

The EY2012 **closing event "From visions to actions"** was held in Nicosia on 10 December 2012, and commenced with the presentation of a statement from the President of the Republic of Cyprus, followed by a speech by the Mr László Andor, EU Commissioner for Employment, Social Affairs and Inclusion. The programme covered a range of issues including the current situation of ageing in Europe (and the still untapped potential to refine policies and to 'activate' more elderly people); guiding principles; promoting employment, social participation and independent living; and the way forward. The closing event also saw the launch of the Active Ageing Index (AAI)<sup>17</sup>, developed by the European Centre for Social Welfare Policy and Research (Vienna), in collaboration with the

<sup>14</sup> <http://europa.eu/citizens-2013/en/news/european-day-solidarity-between-generations-29th-april-journ%C3%A9e-europ%C3%A9enne-de-la-solidarit%C3%A9-entr>.

<sup>15</sup> Council Declaration on the European Year for Active Ageing and Solidarity between Generations (2012): The Way Forward, Brussels, 7 December 2012.

<sup>16</sup> [http://eu2012.dk/en/Meetings/Conferences/Jan/~/\\_media/Files/Conferences/Jan\\_Mar/Programme-Opening-conference.pdf](http://eu2012.dk/en/Meetings/Conferences/Jan/~/_media/Files/Conferences/Jan_Mar/Programme-Opening-conference.pdf).

<sup>17</sup> <http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=1837&furtherNews=yes>.

During the Year itself the conference on “**Good governance for active and healthy ageing**” (Brussels, 4 June 2012) was attended by some 160 participants<sup>18</sup> and included a keynote speech by Mr László Andor and concluding remarks from Paola Testori Coggi, Director General for Health and Consumers, European Commission. Issues discussed included labour market perspectives, best practice cases and national strategies<sup>19</sup>, and the economic case for active ageing by presenting the 2012 Ageing report prepared for DG ECFIN and the Economic Policy Committee.

The EU provided a significant ‘umbrella’ under which many other activities were coordinated or linked. EU activities included the **first conference relating to the Innovation Partnership on Active and Health Ageing** (3 April, 2012)<sup>20</sup>, the organisation of **SeniorForce days** (an explicit example of the end-users citizens being engaged with the Year), activities related to Adult Learning, and the **Prizes for Active Ageing** which explicitly encouraged a wide range of intermediaries (social partners, age-related groups, journalists etc.) to focus on how their activities were successfully linking to the Year. Beyond the citizen and intermediary level there was a wider policy focus through activities such as Public Policy Exchange, a focus on long-term care challenges. At the international level the Year was a motivating factor for global congresses and for the **Vienna Ministerial Declaration** which specifically looked at how the EU and Member States could continue policy developments related to ageing. Also, there were other contexts such as higher education, for an acceleration of research activities.

### 2.3.2 Generations@School

This initiative was designed to encourage teachers to organise activities that bring together school pupils and senior members of local communities, with the aim of stimulating “dialogue between generations” and promoting better inter-generational understanding. The website, which provides guidance, resources and facilitates the sharing of experiences and images (photos, drawings) on a map of Europe was available from the end of February, 2012 and schools could participate from 1 March 2012. Some 420 schools took part in the initiative<sup>21</sup>. Generations@school is continuing in 2013 and participants were encouraged to organise discussions about Europe on 29 April 2013<sup>22</sup>, as a contribution to the European Year of Citizens 2013. More information on this particular initiative is provided in the case study report (Annex I).

### 2.3.3 Seniorforce Day

With over 11,000 participants, the Seniorforce Day initiative received widespread support all over Europe. Presidents, ministers, high-level officials, NGO representatives, scientists and EY2012 Ambassadors took part in the 25 events promoted by the European Commission to honour senior volunteers:

- Finland, 15 September 2012 - An event of Occupy Your Own Age in Helsinki was also a Seniorforce celebration;
- Slovakia, 21-22 September 2012 - The annual Volunteering Days put the focus this year on senior volunteering;

<sup>18</sup> <http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=1634&furtherNews=yes>.

<sup>19</sup> AT, BE, CZ, FI, IRL, PL and PT.

<sup>20</sup> [http://ec.europa.eu/research/innovation-union/index\\_en.cfm?section=active-healthy-ageing&pg=conference](http://ec.europa.eu/research/innovation-union/index_en.cfm?section=active-healthy-ageing&pg=conference).

<sup>21</sup> Data from PAU Education.

<sup>22</sup> “*Its past, its present and about what old and young can do together for building the Europe of tomorrow*”.



- Bulgaria, 23 September 2012 - The Seniorforce Day was held in Sofia under the motto "Sport, health and active longevity";
- Poland - 24-26 September 2012 - "Intergenerational Days for Promoting Activity" convention and Active 50+ fair in Warsaw;
- United Kingdom, 1 October 2012 - The Age UK's Older Volunteer Awards were presented to 14 seniors at a ceremony in Europe House, London;
- Sweden, 1 October 2012 - The Seniorforce Day was staged at Orebro's Senior Festival;
- Denmark, 1 October 2012 - Intergenerational collaboration examples and senior volunteering initiatives were highlighted at a Seniorforce event in Roskilde;
- Germany, 1 October 2012 - A seminar in Stuttgart emphasized the important role of life long learning and voluntary activities after retirement;
- Italy, 1 October 2012 - The Seniorforce Day was held in the city of Taglio Di Po as part of a whole month of activities programmed to honour the elderly;
- Latvia, 1 October 2012 - Senior volunteers presented the local Registry Office of Livani with 60 pairs of baby booties;
- Slovenia, 3 October 2012 - "The Power of Senior Volunteers" round table was held at the Festival of the Third Age, in Ljubljana;
- Cyprus, 3 October 2012 - "Volunteering and Active Ageing" event in Nicosia;
- Estonia, 5 October 2012 - Senior volunteers were awarded at a ceremony held during the Senior Festival in Tallinn;
- The Netherlands, 5 October 2012 - The Seniorforce Day was held with a series of activities in the city of Haarlem;
- Portugal - 6 October 2012 - Around 800 citizens participated in the "Generations in Movement" festive day, in Oeiras;
- Ireland - 5-7 October 2012 - Students from Drogheda and Dundalk discovered firsthand what exactly senior volunteers do to help out locally;
- Belgium - 11 October 2012 - Volunteering organisations and seniors aged 55+ participated in a workshop in the city of Hasselt;
- Luxembourg - 13 October 2012 - The Seniorforce Day was celebrated with the seminar "The key to a successful transition to retirement", in Luxembourg;
- Austria - 13 October 2012 - The first Volunteering Fair in Vienna brought special attention to the EY2012 promoting volunteering "for and from" the elderly;
- Spain - 16 October 2012 - Senior volunteers and the beneficiaries of their actions shared their experiences in an event held in Madrid;
- Lithuania - 16 October 2012 - Over 300 seniors attended the Generations Volunteering Day, celebrated at the National Philharmonic Society, in Vilnius;
- Czech Republic - 18 October 2012 - EY2012 Ambassadors Kveta Fialova and Michal Giboda participated in the Seniorforce Day held at a retirement home in Humpolec;
- Hungary - 19 October 2012 - Old craftsmen taught young people the secrets of traditional arts in a joyful event held at the village of Magyarpolány;
- Greece - 24 October 2012 - Teenagers, university students and older people worked hand in hand in a series of interactive creative workshops in Athens;
- Romania - 25 October 2012 - "Workshops to encourage volunteering among senior citizens" held in Bucharest.

#### 2.3.4 EU Prizes for Active Ageing

Awards were given in seven categories: Social Entrepreneurs, Workplaces for all Ages, Towards Age-Friendly Environments, Generations@school, Life Story Challenge, as well as written and audio-visual journalism. Prizes were distributed at an Awards Ceremony in Brussels on 13

November, 2012. Overall there were 1,386 submissions – the table below sets out more detail in terms of countries and individual award categories:

**Table 2-3 Overview of Awards submissions – EU Prizes for Active Ageing**

COUNTRY	Workplaces for All Ages Awards	Social Entrepreneurs Awards	Journalists Awards - Written	Journalists Awards – Audio Visual	Towards Age- Friendly Environments Awards	Generations@school	Life Story Challenge	Total
Austria	10	11	29	16	14	11	2	93
Belgium	3	5	17	6	10	7	1	49
Bulgaria	1	2	2	2	0	30	2	39
Cyprus	0	1	4	1	0	0	1	7
Czech Republic	0	3	6	4	8	5	1	27
Denmark	0	2	9	2	2	0	1	16
Estonia	0	2	6	0	1	5	1	15
Finland	2	3	24	4	7	4	1	45
France	5	12	10	1	12	2	2	44
Germany	5	52	51	25	26	11	3	173
Greece	1	2	2	2	6	15	2	30
Hungary	0	3	3	4	9	15	10	44
Ireland	0	5	1	5	9	8	0	28
Iceland	0	1	0	0	0	0	0	1
Italy	5	17	20	4	10	21	10	87
Latvia	5	5	16	3	8	15	2	54
Liechtenstein	0	0	0	0	0	0	0	0
Lithuania	0	1	1	0	1	25	1	29
Luxembourg	0	1	2	0	1	1	1	6
Malta	0	1	2	0	2	1	5	11
Netherlands	1	5	5	2	0	1	1	15
Norway	3	1	0	0	0	0	0	4
Poland	2	5	16	6	15	46	3	93
Portugal	2	38	12	7	35	13	3	110
Romania	2	7	7	5	6	60	5	92
Slovakia	2	2	8	3	9	17	6	47

COUNTRY	Workplaces for All Ages Awards	Social Entrepreneurs Awards	Journalists Awards - Written	Journalists Awards – Audio Visual	Towards Age- Friendly Environments Awards	Generations@school	Life Story Challenge	Total
Slovenia	0	1	5	4	4	11	7	32
Spain	4	36	26	6	20	26	4	122
Sweden	0	2	13	0	4	1	0	20
United Kingdom	6	8	11	3	14	10	1	53
<b>Total</b>	<b>59</b>	<b>234</b>	<b>308</b>	<b>115</b>	<b>233</b>	<b>361</b>	<b>76</b>	<b>1386</b>

Source: PAU education.

The category that attracted the most entries was Generations@School (361), followed by the Journalists' Award (308) and Social Entrepreneurs Award (234). The award that attracted the fewest entries was workplace for all ages (59). In terms of geographical distribution, Germany, Spain and Portugal provided high number of entries (173, 122 and 110 respectively); while the UK and France provided comparatively few entries for their size (55 and 44 respectively, compared with 93 for both Austria and Poland). The prizes were awarded to:

- Intergenerational encounters in schools (FI);
- Journalism – (written) The Generation Gap, JP/Politiken Hus, (DK);
- Bruno Pöder, Kersti Skovgaard, (EE), who continued to work as a surgeon until the age of 80;
- Social Entrepreneurship - Two Generations Share a House, Typhaine de Penfentenyo (FR);
- Age-Friendly Environments - Life-Long Living, Fredericia (DK);
- Workplace for all Ages - Managing People of Different Ages, Helsingin kaupunki, Henkilöstökeskus (FI).

### 2.3.5 *Active ageing index*

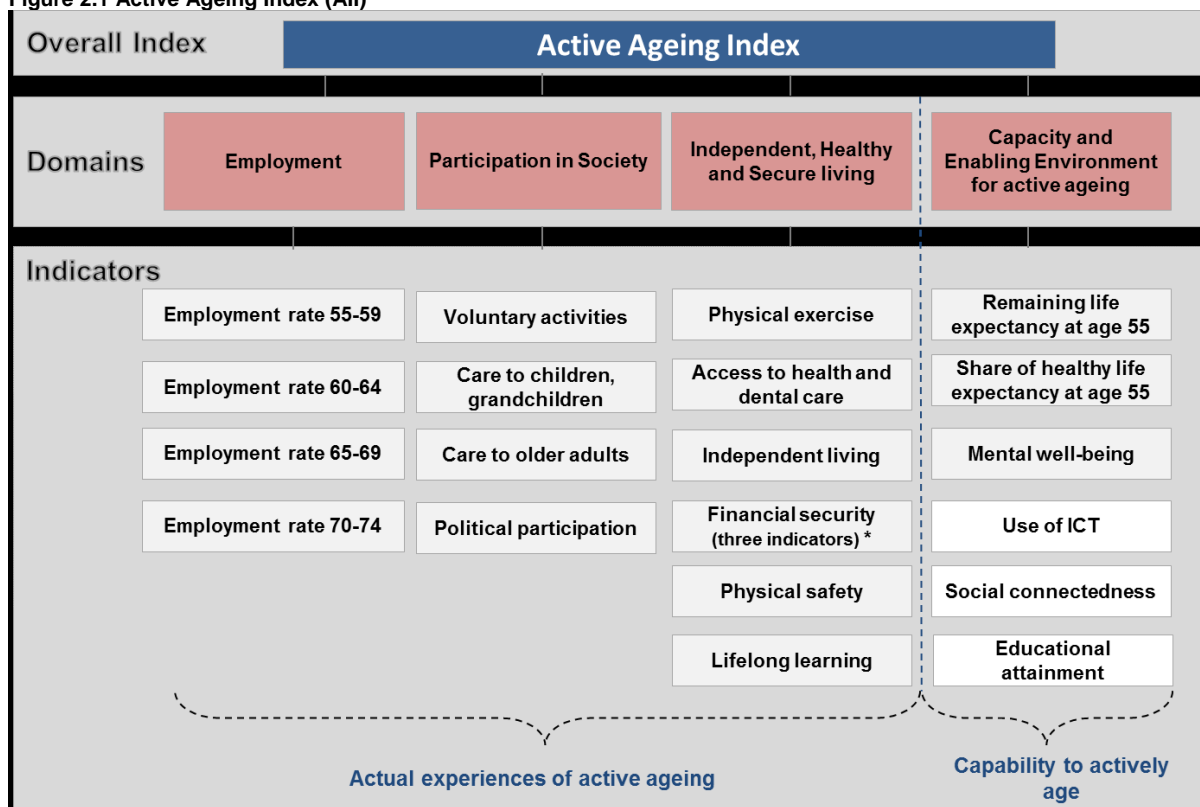
All of the material above indicated broad areas of 'activity'. Promotion and policy are essential elements to the Year, but there is real value in developing a comparative metric that allows the EU and Member States to understand how their respective policies are delivering against the ageing objectives. Towards the end of the Year the Active Ageing Index (AAI) was released as an analytical tool to:

“... measure the untapped potential of older people for active and healthy ageing across countries. It measures the level to which older people live independent lives, participate in paid employment and social activities as well as their capacity to actively age”<sup>23</sup>.

Using official (Eurostat) and harmonised statistics it uses 22 indicators (Figure 1.1) across four domains of interest during the EY2012. One domain focused on the means by which active ageing could be enabled (health, social embeddedness, education skills and ICTs etc.) and the other three focus on maximising employment, in actively participating in society, and remaining independent and healthy.

<sup>23</sup> <http://www1.unece.org/stat/platform/display/AAI/I.+AAI+in+brief>.

Figure 2.1 Active Ageing Index (AAI)



Source: AAI Policy Brief, March 2013<sup>24</sup>.

The AAI was developed by the European Centre for Social Welfare Policy and Research (Vienna), in collaboration with the United Nations Economic Committee for Europe (UNECE) and the European Commission DG Employment, Social Affairs and Inclusion. Countries are positioned on the Index according to how they score and it is intended to facilitate comparison in terms of tracking progress. The AAI importantly aims to stimulate future research, policy-making and the development of large-scale data sets. Further development of the AAI will include a retrospective calculation and a new calculation for 2014/2015.

### 2.3.6 Guiding principles on active ageing

A set of Guiding Principles on Active Ageing and Solidarity between Generations were adopted by the Council on 6 December 2012<sup>25</sup>. There are 19 principles structured under the headings (and dimensions of the EY2012): employment, participation in society and independent living. The principles have the joint value of bringing together the antecedents and activities of the Year, and re-focusing them on tangible principles. The Guiding Principles are illustrated in the following box<sup>26</sup>:

<sup>24</sup> <http://europa.eu/ey2012/ey2012main.jsp?langId=en&catId=970&newsId=1749&furtherNews=yes>.

<sup>25</sup> <http://europa.eu/ey2012/ey2012main.jsp?langId=en&catId=970&newsId=1743&furtherNews=yes>.

<sup>26</sup> <https://webgate.ec.europa.eu/eipaha/library/index/show/id/491>.

## **Employment**

- Continuing vocational education and training: Offer women and men of all ages access to, and participation in, education, training and skills development allowing them (re-)entry into and to fully participate in the labour market in quality jobs;
- Healthy working conditions: Promote working conditions and work environments that maintain workers' health and well-being, thereby ensuring workers' life-long employability;
- Age management strategies: Adapt careers and working conditions to the changing needs of workers as they age, thereby avoiding early retirement;
- Employment services for older workers: Provide counselling, placement, reintegration support to older workers who wish to remain on the labour market;
- Prevent age discrimination: Ensure equal rights for older workers in the labour market, refraining from using age as a decisive criterion for assessing whether a worker is fit for a certain job or not; prevent negative age-related stereotypes and discriminatory attitudes towards older workers at the work place; highlight the contribution older workers make;
- Employment-friendly tax / benefit systems: Review tax and benefit systems to ensure that work pays for older workers, while ensuring an adequate level of benefits;
- Transfer of experience: Capitalise on older workers' knowledge and skills through mentoring and age-diverse teams;
- Reconciliation of work and care: Adapt working conditions and offer leave arrangements suitable for women and men, allowing them as informal carers to remain in employment or return to the labour market.

## **Participation in society**

- Income security: Put in place systems that provide adequate incomes in old age preserving the financial autonomy of older people and enabling them to live in dignity;
- Social inclusion: Fight social exclusion and isolation of older people by offering them equal opportunities to participate in society through cultural, political and social activities;
- Senior volunteering: Create a better environment for volunteer activities of older people and remove existing obstacles so that older people can contribute to society by making use of their competences, skills and experience;
- Life-long learning: Provide older people with learning opportunities, notably in areas such as information and communication technologies (ICT), self-care and personal finance, empowering them to participate actively in society and to take charge of their own life;
- Participation in decision making: keep older women and men involved in decision making, particularly in the areas that directly affect them;
- Support for informal carers: Make professional support and training available to informal carers; ensure respite care and adequate social protection to prevent social exclusion of carers.

### Independent living

- Health promotion and disease prevention: Take measures to maximise healthy life years for women and men and reduce the risk of dependency through the implementation of health promotion and disease prevention. Provide opportunities for physical and mental activity adapted to the capacities of older people;
- Adapted housing and services: Adapt housing and provide services that allow older people with health impairments to live with the highest possible degree of autonomy;
- Accessible and affordable transport: Adapt transport systems to make them accessible, affordable, safe and secure for older people, allowing them to stay autonomous and participate actively in society;
- Age-friendly environments and goods and services: Adapt local environments as well as goods and services so that they are suitable for people of all ages (design-for-all approach), in particular by making use of new technologies, including eHealth; prevent age discrimination in the access to goods and services;
- Maximising autonomy in long-term care: For people in need of help/care, ensure that their autonomy and participation are augmented, preserved or restored to the greatest possible extent and that they are treated with dignity and compassion.

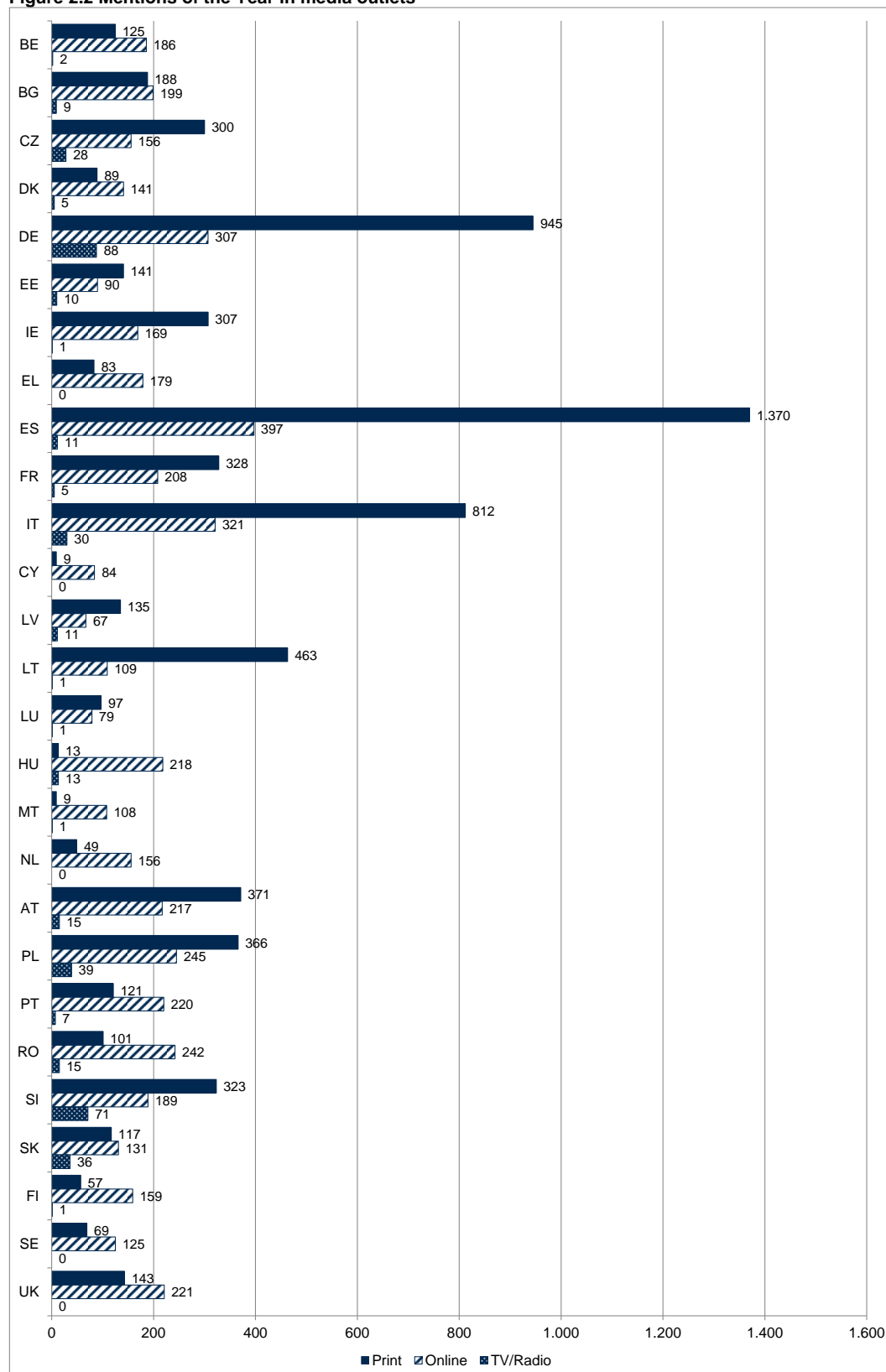
### 2.3.7 Results of media and communication

The following statistics are from media 'clippings' reported by Pau Education, and specifically relate to items where the Year is explicitly mentioned (Jan 2012 to Feb 2013). In their analysis Pau Education 'scaled up' the numbers using a multiplier of the official numbers of copies sold for each of the newspapers that were monitored. The use of such a blunt multiplier assumes first that the copies were read, and second that the specific story was read by each and every reader. We have not reproduced the scaling up.

Instead, we observe that the Year did actually receive explicit mention in major European media outlets. These mentions were not indirect (for example assuming that an article about ageing must have some connection to the Year), but are explicit demonstrations that reporters had been sensitised to the Year and were writing about it in their media outlets.



**Figure 2.2 Mentions of the Year in media outlets**



Source: PAU Education.

As part of the Irish Presidency, which covered the first six months of the Year, there was a specific report from the Irish President Michael D. Higgins, who emphasised:

"Age has taken on a whole new meaning, with middle age coming later and later in life and retirement now more often seen as a new beginning rather than any quiet winding down or retreat from active and valuable

participation in society. Unfortunately, however, misconceptions and even old and exclusionary stereotypes still abound. As a result, older people are often excluded and many are isolated from Irish society. This year, we as a nation, have an opportunity not only to recognise, but to shine a light on the significant contributions that older people continue to make in society; a light that looks beyond the artificial barrier of working retirement age which so many people use to define a person's usefulness".

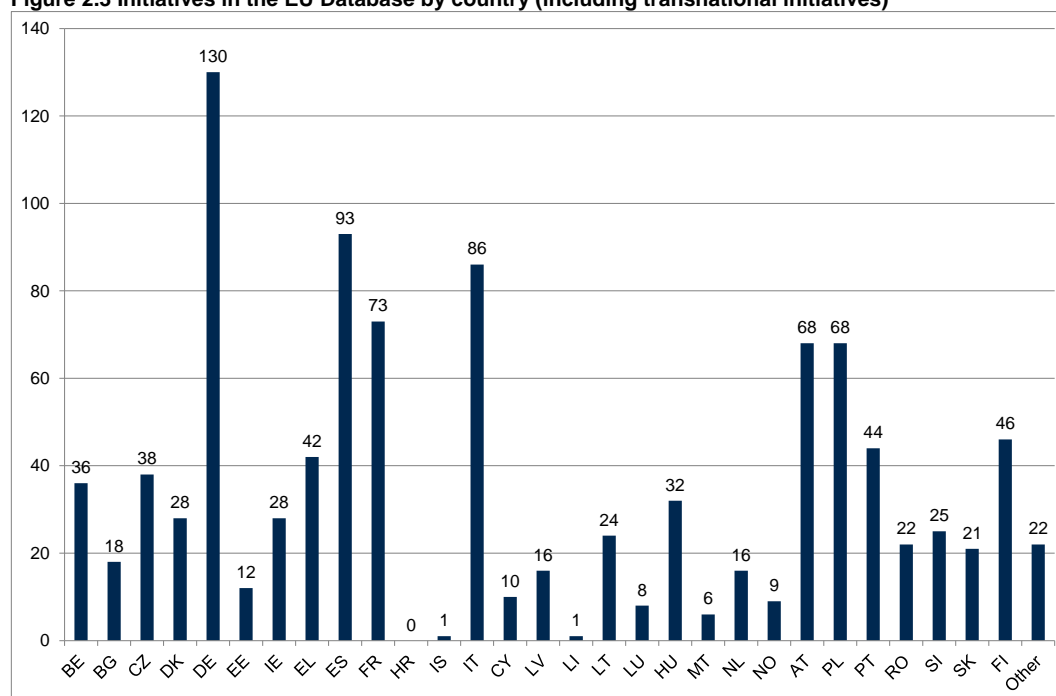
## 2.4 Implementation in participating countries

### 2.4.1 Initiatives and outputs in participating countries

As a preliminary consideration it is worth pointing out that since the EU did not provide any country-specific grant funding, it is difficult to distinguish activities promoted *because* of the Year and activities that were instead *framed* in the Year. However, the number and types of activities, outputs and results produced at the national level were identified as regards extent and level of dissemination.

A detailed analysis of the database of initiatives included in the EY2012 website<sup>27</sup>, provides information on the level of involvement of countries in EU-wide activities, the organisation of independent activities at country level by the NCs, and the activities promoted by stakeholders. This analysis indicates that a total of 748 (585 national and 163 transnational) initiatives were implemented. Figure 2.3 shows the number of initiatives in which each country was involved. In this and the following figures, the sum of partials does not equal to the total of initiatives because of transnational initiatives and the fact that each initiative could fall under different headings. The headings are those used in the EU database.

**Figure 2.3 Initiatives in the EU Database by country (including transnational initiatives)**



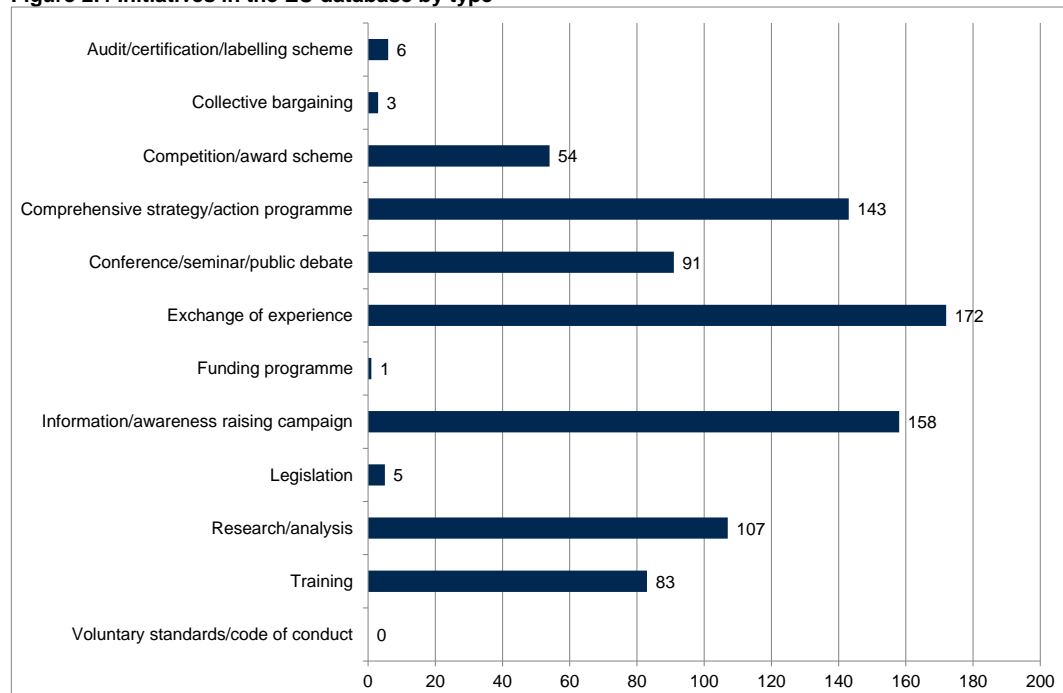
Source: Ecorys calculations on EU database.

The database also allows us to consider **the types of activities** implemented at national level – this suggests an emphasis on exchange of knowledge and experience and providing

<sup>27</sup> <http://europa.eu/ey2012/ey2012main.jsp?catId=975&langId=en&mode=searchSubmit&country=7>.

information/awareness raising. There appears to be comparatively less of a focus on legislation/codes /labelling and funding programmes (see Figure 2.4 below).

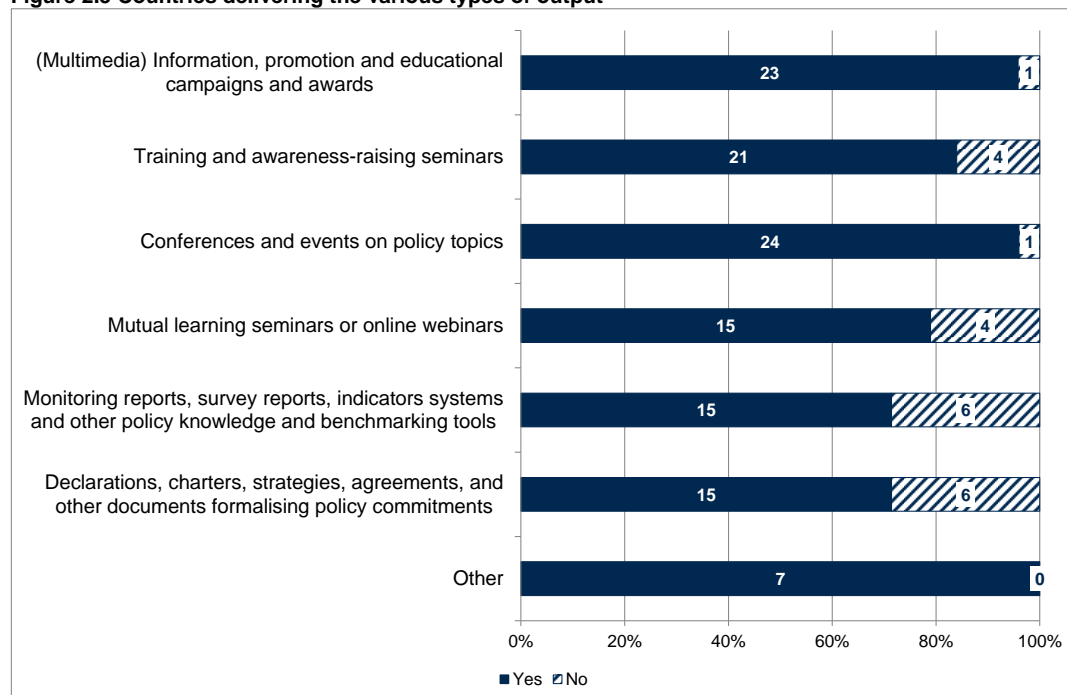
**Figure 2.4 Initiatives in the EU database by type**



Source: Ecorys calculations on EU database.

The evidence from the results of the online survey of NCs also provides useful information on the types of activities implemented (see Figure 2.5 below). This evidence is consistent with the database in highlighting the relative importance of dissemination and awareness raising activities. The category “other” includes items such as movie festivals, websites and online consultations, public-private partnership models, activity reports.

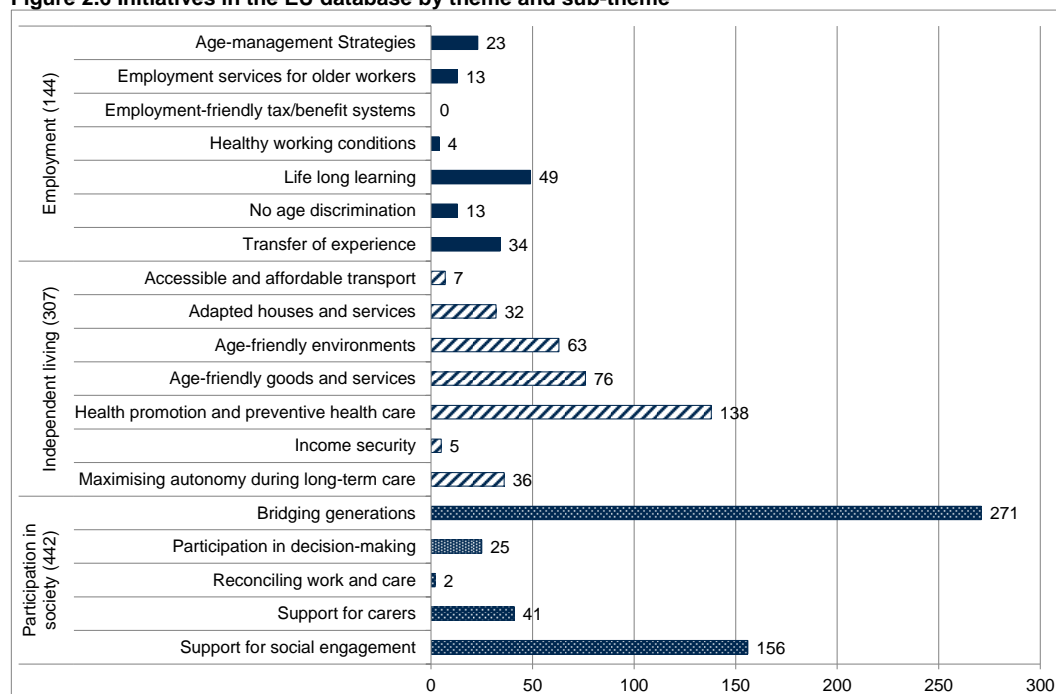
**Figure 2.5 Countries delivering the various types of output**



Source: National Coordinators Survey.

In terms of **thematic coverage**, the database suggests a focus on bridging generations, support for social engagement and health promotion and preventative health care (see Figure 2.6 below). Overall, participation in society appears to have attracted most interest amongst the three overarching themes.

**Figure 2.6 Initiatives in the EU database by theme and sub-theme**



Source: Ecorys calculations on EU database.

In the following table, we provide the detail of the countries where initiatives on the various themes and subthemes were implemented (including when the geographical scope was Europe). We can note that certain themes were picked by few countries, notably healthy working conditions by Finland, Germany and the UK (however, a European level initiative was organised), and reconciliation of work with care by Italy and Austria. The other themes were widely shared across Member States. We also note that on most sub-themes a large number of countries also executed at least one regional activity, confirming the importance of the regional dimension.

**Table 2-4 – Countries where initiatives were implemented on the various themes and subthemes**

Themes and subthemes	Participating countries
<b>Employment</b>	
Age-management strategies	BE, BG*, CZ**, DK*, DE*, EL**, ES**, FR*, IT*, CY**, HU**, MT, NL*, AT*, PL**, RO**, SK**, FI*, UK*, Europe, NO**
Employment services for older workers	BE, CZ**, DK**, DE*, IE**, EL**, ES**, FR*, IT*, AT**, PL**, SK**, UK*
Employment-friendly tax / benefit systems	N/A
Healthy working conditions	DE*, FI*, UK*, Europe
Lifelong learning	BE**, BG**, CZ*, DK*, DE*, EE, IE*, EL*, ES*, FR**, IT*, CY**, LV, LT**, HU**, NL**, AT*, PL*, PT*, SI, SK**, FI*, SE**, UK*, Europe, IS**, NO**
No age discrimination	BE**, CZ**, DK*, DE*, FR*, MT, NL, AT*, PL*, FI*, UK*, Europe
Transfer of experience	BE, BG**, CZ*, DE*, EE, IE*, EL*, ES*, FR**, IT*, LV, LT**, HU**, NL**

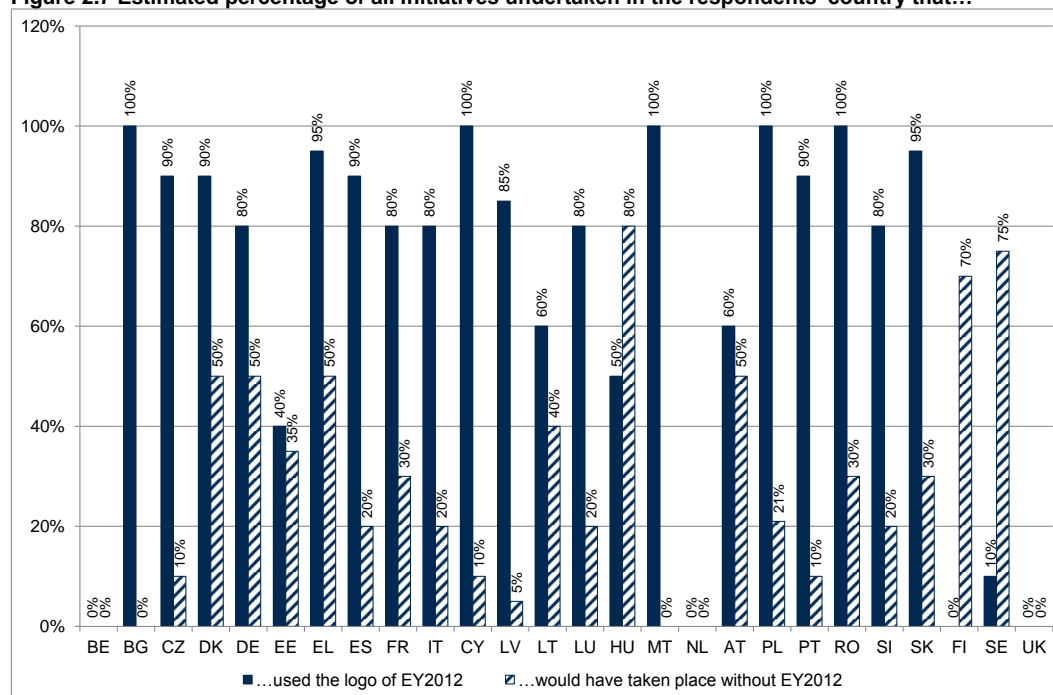
Themes and subthemes	Participating countries
	AT*, PL*, PT*, RO**, SI, FI*, UK*, Europe
<b>Independent living</b>	
Accessible and affordable transport	BE, DK*, DE*, ES**, FR*, NL, AT**, FI**, UK*
Adapted houses and services	BE, BG**, CZ*, DK*, DE*, EL**, ES*, FR*, IT*, LV**, LT**, HU**, NL*, AT*, PL**, PT*, SI**, SK**, FI*, SE*, UK*, Europe, NO**, CH**
Age-friendly environments	BE, BG**, CZ*, DK*, DE*, EE** IE*, EL**, ES*, FR*, IT*, LV, HU*, NL*, AT*, PL*, PT*, RO**, SI, SK**, FI*, SE**, UK*, Europe, NO**
Age-friendly and services	BE, BG**, CZ*, DK*, DE*, EE, IE**, EL*, ES*, FR*, IT*, CY**, LV, LT**, HU**, NL*, AT*, PL**, PT*, RO**, SI, SK*, FI**, SE*, UK*, Europe, CH**, NO**
Health promotion and preventive health care	BE, BG*, CZ*, DK*, DE*, EE, IE*, EL*, ES*, FR*, IT*, CY, LV, LT, LU**, HU*, MT, NL*, AT*, PL*, PT*, SI, SK*, FI*, SE*, UK*, Europe, CH**, NO**
Income security	BE**, BG**, CZ**, DK**, DE**, NL**, PL**, SK**, UK*, NO**
Maximising autonomy during long-term care	BE, CZ*, DK*, DE*, EE**, IE**, EL*, ES*, FR**, IT*, LV, HU**, MT, NL*, AT*, PL**, PT*, RO**, SK**, FI*, SE**, UK*, Europe, CH**
<b>Participation in society</b>	
Bridging generations	BE, BG*, CZ*, DK*, DE*, EE, IE*, EL*, ES*, FR*, IT*, CY, LV, LT, LU, HU*, NL*, AT*, PL*, PT*, RO*, SI, SK*, FI, SE**, UK*, Europe, LI, NO*
Participation in decision-making	BE, CZ**, DK*, DE*, IE*, ES**, FR*, IT**, LU, NL*, AT*, SK*, FI*, UK*, Europe
Reconciling work and care	IT*, AT*
Support for carers	BE**, BG*, CZ*, DK**, DE*, EE**, IE*, EL**, ES*, FR**, IT*, LV**, LT**, HU**, NL*, AT*, PL**, PT*, RO*, SK**, FI*, SE*, UK*, Europe, CH**
Support for social engagement	BE**, BG**, CZ*, DK*, DE*, EE, IE*, EL*, ES*, FR*, IT*, CY, LV**, LT, LU, HU*, MT, NL*, AT*, PL*, PT*, RO*, SI, SK*, FI*, SE*, UK*, Europe, CH**

\* This country executed at least one regional activity. England, Scotland, Wales and Northern Ireland are considered regions of the United Kingdom.

\*\* This country only participated in transnational activities.

As highlighted above, an important consideration is the extent to which the activities recorded at national level exhibited 'additionality' (whether or not a new action adds to the existing inputs, instead of replacing any of them, and results in a greater aggregate effect). Figure 2.7 below presents the result of the survey of NCs, in an attempt to shed light on the extent to which the "brand" EY2012 was explicitly used in each country and the extent to which the Year was the initiating factor behind initiatives or a framework for activities that already existed on active ageing.

**Figure 2.7 Estimated percentage of all initiatives undertaken in the respondents' country that...**



Source: National Coordinators Survey.

This evidence shows large variations between countries, on its own it is rather crude and relies heavily on individual opinions. Nevertheless it does suggest that the use of the EY2012 logo was high, with the possible exceptions of Sweden, Estonia and Hungary. There is a widespread perception that only part of the initiatives have taken place *just because* of the EY2012 (seven out of 22 NCs rated this share at 50% or above). Comments made by NCs on this issue suggest that in many countries relevant activities and programmes were already in place, and given the absence of specific extra funding for the Year, a large proportion of activity was adapted from these pre-existing, long-term activities. For example: *“As there was no special financial support for the EY2012 mainly the projects were already running or programmes adapted to the thematic year, such as the Senior Friendly Local Municipality Award, which is a yearly project with a new topic”*<sup>28</sup>. The use of the logo however may have increased awareness and helped link otherwise disparate sets of activities: *“Most activities were set up by volunteers. They wanted to make use of the EY 2012 to highlight their initiative. At the public level there was a national campaign with the social partners to implement sustainable employability”*<sup>29</sup>.

In terms of entirely ‘new’ projects, examples included: Projects on employment retention, health issues, retirement surveys and elderly-care projects (Denmark); celebration of the International Day of Elderly (including seminars and Seniors' Gala organized by local authorities, outdoor events, and local projects to support the elderly and to develop care services (Romania); EY Garden Party, competition for municipalities and other events organized by municipalities (Latvia); and Generation House established in Tallinn and hostel for older persons in Võhma (Estonia). In Finland it was highlighted by the NC that a senior force day had been organised for a number of years and Generations at school-type activities are already very common in schools. This helps to explain the assessment by the NC that 70% of activity would have taken place without the EY2012, and perhaps highlights a wider issue, particularly for countries with a positive track record in the field of active ageing: how to approach the Year when policies and programmes in this area are already well developed.

<sup>28</sup> NC, Hungary.

<sup>29</sup> NC, The Netherlands.

## 2.4.2 The degree of mobilisation in countries

We used a number of sources of evidence to assess which countries were more and less active, namely data on press activity, the activity database on the website, response rates to the EY2012 Awards and feedbacks from the communication contractor.

The data in the Table 2-5 highlights a group of (mostly smaller) countries that appear to have been particularly active: Austria, the Baltic countries (Estonia, Latvia, Lithuania), Cyprus, Luxembourg and Slovenia. A further eight countries emerge as moderately active (Belgium, Denmark, Czech Republic, Finland, Ireland, Portugal, Slovakia and Hungary). According to this data, most of the larger countries feature amongst the least active group. Evidence from the consultations with the communication contractor confirms the comparably strong response from the Baltic countries (potentially explained by the need for action on the *“large gap between young and old”*, together with Austria (and Germany). The communication contractor believed Nordic/Northern countries may have been less engaged as a result of their already advanced stage of development in the relevant fields but there is no sufficient evidence to support this common sense explanation.

**Table 2-5 Level of activity in countries according to three indicators: press clippings, initiatives in EU database, candidatures to awards**

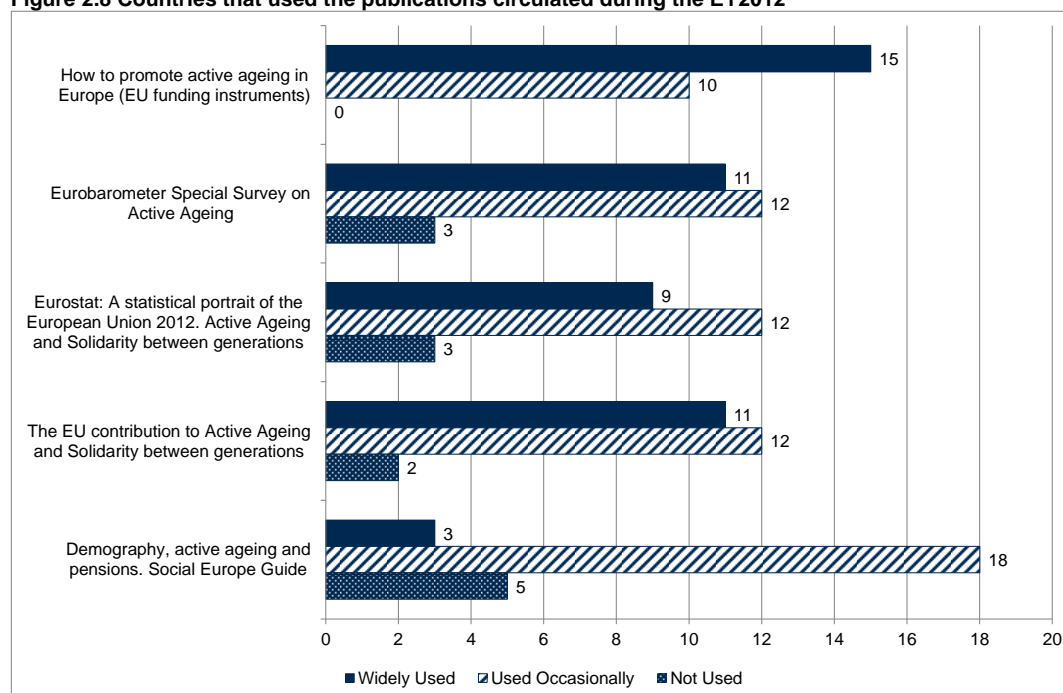
	Press clippings x 1000 000 inhab.	Country	N. initiatives x 1000 000 inhab.	Country	N. candidatures x1000.000 inhab.
Luxembourg	329,59	Lichtenstein	27,14	Latvia	26,77
Slovenia	283,17	Malta	11,87	Malta	26,11
Malta	280,13	Luxembourg	11,17	Slovenia	15,54
Lithuania	192,81	Slovenia	7,29	Estonia	11,66
Estonia	187,33	Cyprus	6,96	Luxembourg	11,17
Cyprus	107,89	Latvia	5,95	Austria	10,96
Latvia	105,57	Estonia	5,44	Portugal	10,49
Ireland	103,73	Austria	5,18	Lithuania	9,76
Austria	71,04	Finland	4,98	Slovakia	8,69
Bulgaria	54,38	Lithuania	4,04	Finland	8,29
Slovakia	52,49	Ireland	3,91	Cyprus	8,12
Czech Republic	46,02	Denmark	3,03	Ireland	6,09
Denmark	41,94	Portugal	2,96	Bulgaria	5,36
Finland	39,99	Hungary	2,42	Hungary	4,44
Spain	38,65	Slovakia	2,40	Belgium	4,38
Portugal	33,18	Czech Republic	2,19	Romania	4,32
Belgium	27,99	Belgium	2,06	Iceland	3,11
Hungary	24,63	Greece	1,95	Denmark	2,86
Greece	23,21	Bulgaria	1,92	Greece	2,66
Sweden	20,30	Sweden	1,47	Spain	2,65
Italy	19,58	Netherlands	1,37	Czech Republic	2,57
Poland	16,87	Germany	1,16	Poland	2,41
Romania	16,80	Spain	1,15	Germany	2,11
Germany	16,34	UK	1,13	Sweden	2,09
Netherlands	12,22	Poland	1,06	Italy	1,46

	Press clippings x 1000 000 inhab.	Country	N. initiatives x 1000 000 inhab.	Country	N. candidatures x1000.000 inhab.
France	8,24	Norway	0,99	Netherlands	0,89
UK	5,71	Italy	0,79	UK	0,83
Iceland	n/a	France	0,69	Norway	0,79
Lichtenstein	n/a	Romania	0,52	France	0,67
Norway	n/a	Iceland	n/a	Lichtenstein	0,00

Source: Ecorys calculations on PAU Education data and EU database.

The results of the online survey of NCs provide evidence on the uptake of the various publications generated during the EY2012 (see Figure 2.8 below). This suggests information on promoting active ageing using EU funding instruments proved most useful, whereas material on demography, active ageing and pensions (Social Europe Guide) was not widely used. This is perhaps not surprising, given that the latter is predominantly a document designed to provide a EU policy overview (although it does also encompass best practice from Member States).

**Figure 2.8 Countries that used the publications circulated during the EY2012**



Source: National Coordinators Survey.

#### 2.4.3 The supportive role of PAU Education

The communication contractor had a key role to play in helping to mobilise activity at national level. The majority of NCs were based in national ministries and the communication contractor assigned their own country co-ordinators to work with NCs on the national campaigns, which encompassed national tailoring of Seniorforce Days, Generations at School, the Awards initiative etc. This had to be achieved taking into account wide variations between country contexts (policy development, structures and priorities) and the national resources made available. Feedback received on PAU from the NCs was reportedly positive and appreciative of the support provided.

PAU reported that the approach adopted was “...not to impose direction or activity from the top down”, but to provide support to whatever the NC had decided to implement.

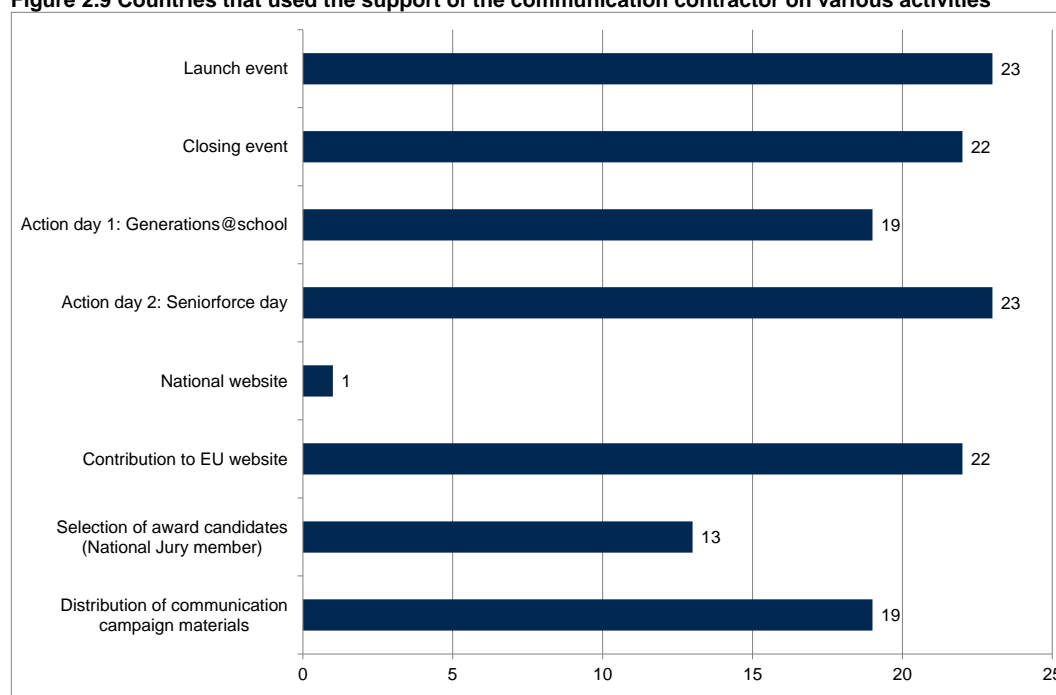


Unlike previous European Years, local sub-contracting to deliver support for national campaigns was not the preferred approach and most of the contractor's work to support the delivery of the national campaigns was carried out centrally, from the Barcelona head office (staff there were able to operate in a wide range of languages). In addition, depending on individual circumstances local support on the ground was provided for certain national events.. PAU assigned country co-ordinators to work with NCs on the national campaigns, which encompassed national tailoring of Seniorforce Day, Generations at School, the Awards initiative for example. In these cases a local PR expert was engaged who was familiar with the national/local context, so the approach could be adjusted accordingly.

There was a degree of flexibility - some countries had their own PR arrangements (for example where they wanted to emphasize particular national elements); others relied more on the communication contractor and in some cases the ministries did their own PR. In practice PAU agreed a set number of days of PR support for national activity. Then each country could decide what they required beyond that, to allow for flexibility and tailoring of activity.

Figure 2.9 below illustrate the involvement of the National Coordinators and the cooperation with PAU Education in organising the various EY2012 activities at country level. This confirms that the greatest need and amount of support provided concerned the high-profile components of the Year – opening and closing events, Generations@school and Seniorforce Day. All countries used some kind of support, with Finland making the most limited use of it (but still being supported for opening and closing events) and the Slovak Republic making the widest use of it, in relation to all activities.

**Figure 2.9 Countries that used the support of the communication contractor on various activities**

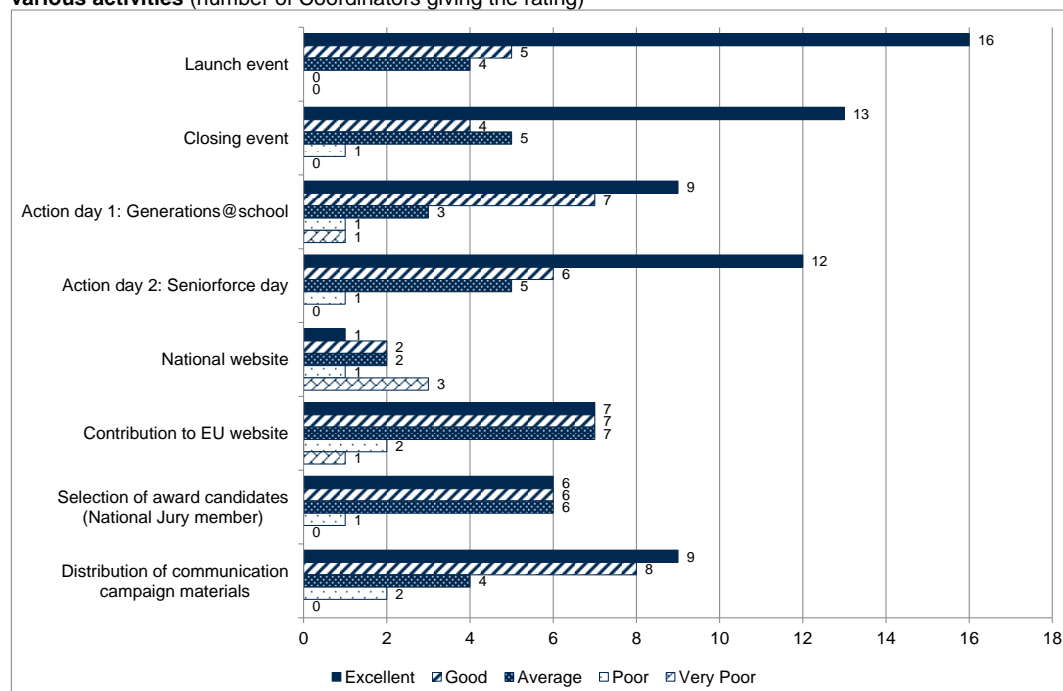


Source: National Coordinators Survey.

The interviews with PAU indicate that feedback from NCs on the support provided was generally positive. This outcome is also supported by the results of the online survey of NCs (see Figure 2.10 below): NCs rated cooperation very highly, particularly with respect to the opening and closing events. The areas where satisfaction is comparatively lower is in respect of the EU website and selection for the awards (although the feedback here is not that negative). Views of NCs on the support provided to national websites are the least positive of all the dimensions assessed in the

survey but this corresponds in most cases to a lack of involvement in this activity in general, as shown by the figure above.

**Figure 2.10 National Coordinators' assessment of the cooperation with the communication contractor in various activities** (number of Coordinators giving the rating)



Source: National Coordinators Survey.

#### 2.4.4 The role of stakeholders

We have also analysed the extent to which stakeholders contributed to the intensity of activity in the Year, and which types of stakeholders in particular.

Almost all participating countries set up a stakeholders committee or coalition, or organised periodical stakeholders meetings during the Year.

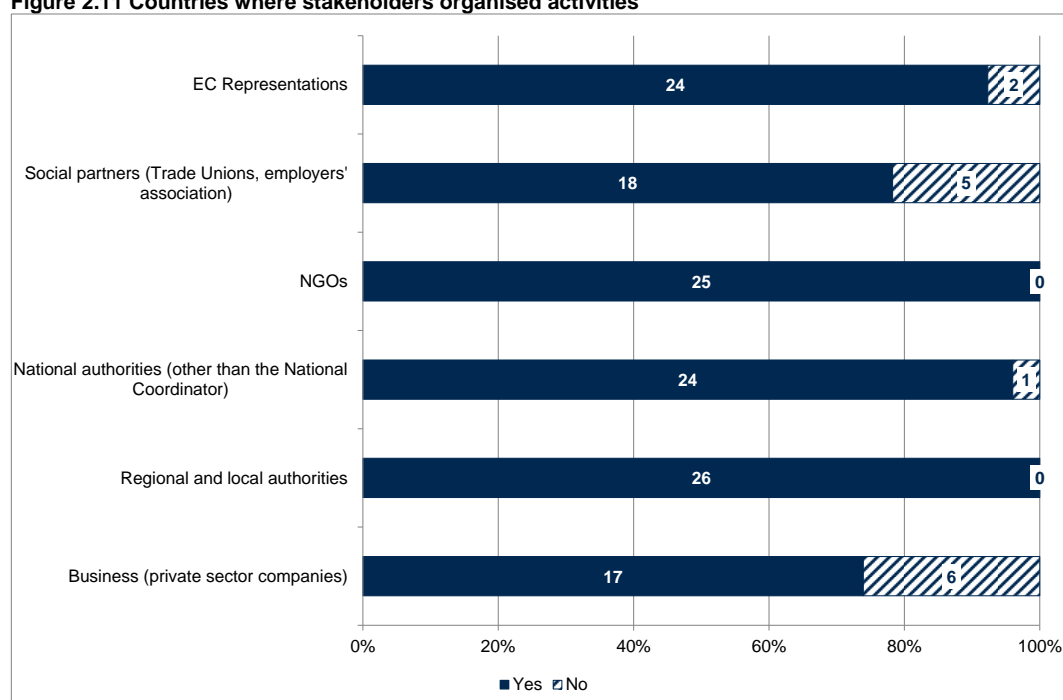
The results of the online survey of stakeholders provides information on the breakdown of types of stakeholders involved in the Year (see Figure 2.11 below). It is apparent that mobilisation was strong across most categories, and was not confined to NGOs. The involvement of national and regional authorities is particularly positive, given the potential for these stakeholders to mainstream approaches and change policies to promote active and healthy ageing. This evidence also suggests that the involvement of the private sector was higher than is normally the case for European Years.

**Table 2-6 Countries where stakeholders organised activities**

	EC Representat ions	Social partners (Trade Unions, employers' association)	NGOs	National authorities (other than the National Coordinator)	Regional and local authorities	Business (private sector companies)
Hungary	Yes	NA	Yes	Yes	Yes	NA
Portugal	Yes	Yes	Yes	Yes	Yes	Yes
Austria	Yes	Yes	Yes	Yes	Yes	Yes

	EC Representat ions	Social partners (Trade Unions, employers' association)	NGOs	National authorities (other than the National Coordinator)	Regional and local authorities	Business (private sector companies)
Lithuania	Yes	Yes	Yes	Yes	Yes	No
Finland	Yes	Yes	Yes	Yes	Yes	No
Spain	Yes	Yes	Yes	Yes	Yes	Yes
Netherlands	Yes	No	Yes	No	Yes	Yes
Estonia	No	Yes	Yes	Yes	Yes	Yes
France	Yes	No	NA	Yes	Yes	Yes
Slovak Republic	Yes	Yes	Yes	Yes	Yes	Yes
Denmark	Yes	Yes	Yes	Yes	Yes	Yes
Czech Republic	Yes	Yes	Yes	Yes	Yes	Yes
Belgium	Yes	Yes	Yes	Yes	Yes	Yes
Poland	Yes	Yes	Yes	Yes	Yes	No
Italy	Yes	NA	Yes	Yes	Yes	Yes
Romania	Yes	No	Yes	Yes	Yes	No
Slovenia	Yes	Yes	Yes	Yes	Yes	No
Malta	Yes	Yes	Yes	Yes	Yes	Yes
Bulgaria	Yes	Yes	Yes	Yes	Yes	Yes
Greece	Yes	NA	Yes	NA	Yes	NA
Germany	Yes	Yes	Yes	Yes	Yes	Yes
Cyprus	Yes	No	Yes	Yes	Yes	No
Luxembourg	Yes	Yes	Yes	Yes	Yes	NA
Latvia	Yes	Yes	Yes	Yes	Yes	Yes
Sweden	Yes	No	Yes	Yes	Yes	Yes
UK	No	Yes	Yes	Yes	Yes	Yes

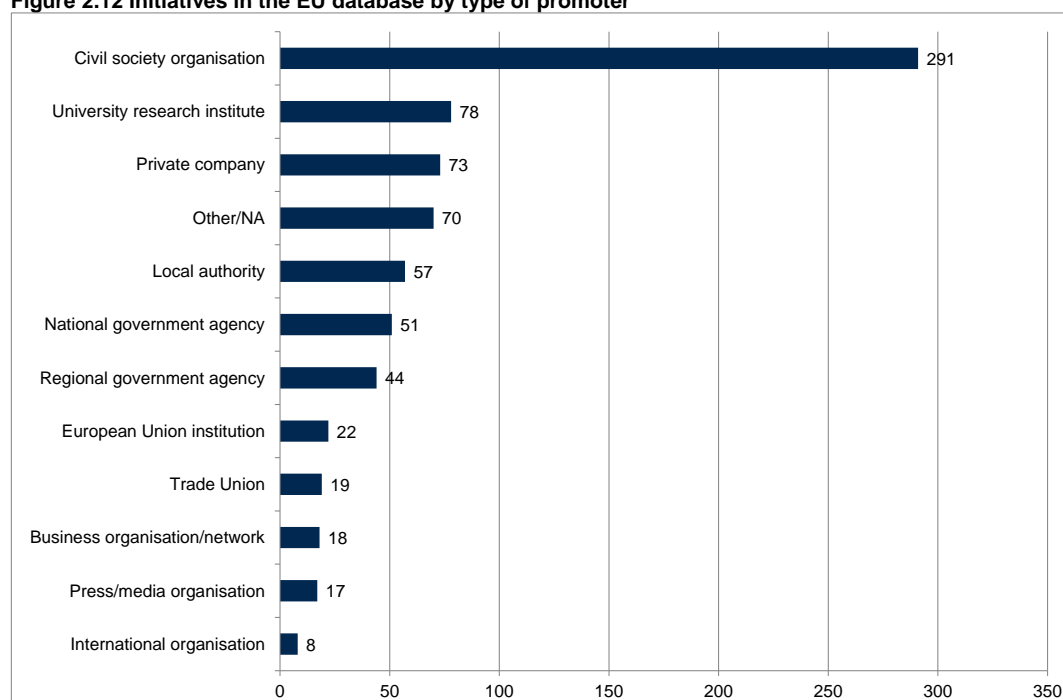
**Figure 2.11 Countries where stakeholders organised activities**



Source: National Coordinators Survey.

However the composition of project promoters, as derived from analysis of the activity database (Figure 2.12), indicates a predominance of civil society organisations (the single largest group, at 39% of the total); although a diverse range of others are also present, including business organisations. Regional and local authorities are represented and given that many civil society organisations may be relatively small in size, and possibly scope, the distribution may be considered appropriate.

**Figure 2.12 Initiatives in the EU database by type of promoter**

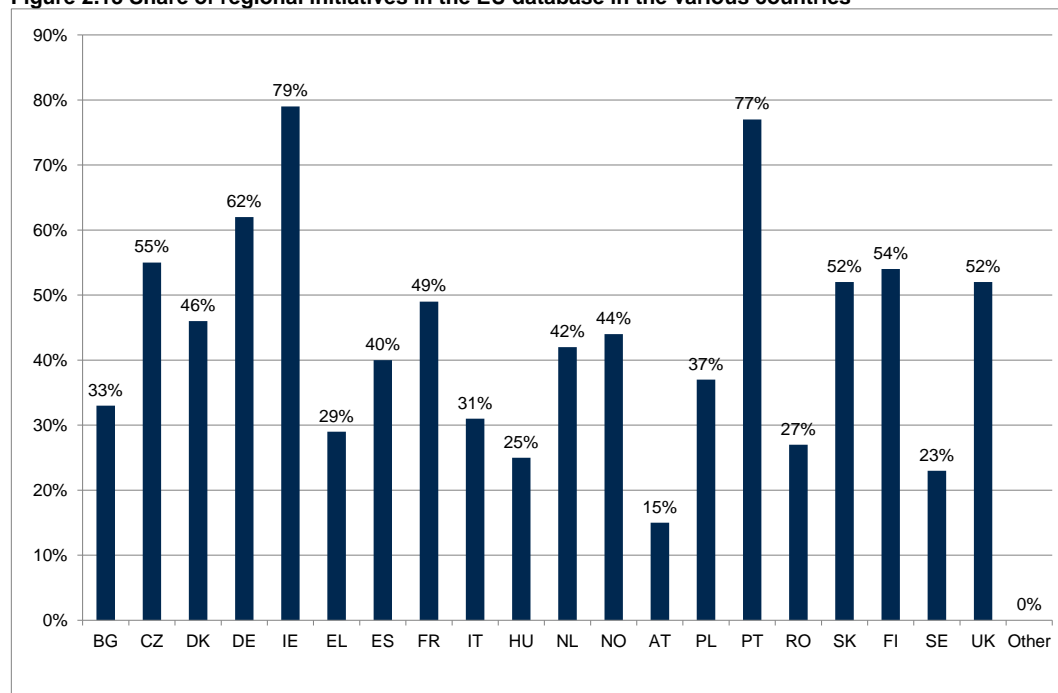


Source: Ecorys calculations on EU database.

#### 2.4.5 The role of the regional dimension

One rough measure of the relevance of the regional dimension is the share of regional initiatives in the initiatives submitted by participating countries for the EU database. Regions are those indicated as such in the EU database of initiatives, thus they do not necessarily correspond to administrative entities. The fact that half of the countries had over one third of regional initiatives suggests a comparatively strong regional response to the Year (as already highlighted above, based on the evidence from the surveys and databases of initiatives). Looking at the regional dimension in more detail, Figure 2.13 below shows the variation from country to country. Ireland, Portugal, Germany are the three countries where the regional dimension was stronger. The strength of the regional dimension is not necessarily related to the administrative set-up of the country but may have to do with the extent of - and efforts in – the mobilisation of regional and local stakeholders. Often it was the civil society organisations, and not the regional and local authorities, who organised the regional initiatives.

**Figure 2.13 Share of regional initiatives in the EU database in the various countries**



Source: Ecorys calculations on EU database. "Other" includes all countries not mentioned.

In Annex I, we present the case study of Portugal, which represents an example of successful implementation of the Year through the mobilisation of regional and local actors.

## 2.5 The intervention logic of the EY2012

### 2.5.1 Reconstructing the intervention logic

Every evaluation, and ideally every programme, starts from a theory of change that specifies the expected causal links between activities and outputs, immediate outcomes and results, intermediate and ultimate outcomes. These are the building blocks that enable to apply the evaluation criteria, particularly relevance, effectiveness and impact, efficiency. Now that we have explained what the EY2012 implied in practice, before to illustrate the findings of the application criteria, we can translate this into a reconstructed intervention logic for the year.

This reconstruction was done in the inception phase, on the basis of the legal and other documentation of the Year as well as discussions with EC officials, National Coordinators (NCs) and stakeholders.

### 2.5.2 *The objectives tree*

To identify the **needs** that the EY2012 is seeking to address, it makes sense to depart from the key challenges highlighted by the ex-ante evaluation of the EY2012, namely the need to tackle early retirement, to combat isolation of older people through participation, and to address ill-health in older ages. After the discussions during the National Coordinator meetings we have added the need to foster and preserve intergenerational solidarity, which is at risk in certain countries and a great resource when it is practised. These needs are to be addressed by active ageing policies in the fields of employment, participation and independent living. The Year in fact aims to unite all of them into a single framework.

The **overall objective** of the Year was formulated as ‘mobilising relevant actors in the promotion of active ageing and intergenerational solidarity’, echoing the ex-ante evaluation. This is relatively tangible and concrete, in line with the nature of the Year (i.e. avoiding overly ambitious and far-reaching policy objectives).

The Decision states the specific objectives of the Year, i.e.:

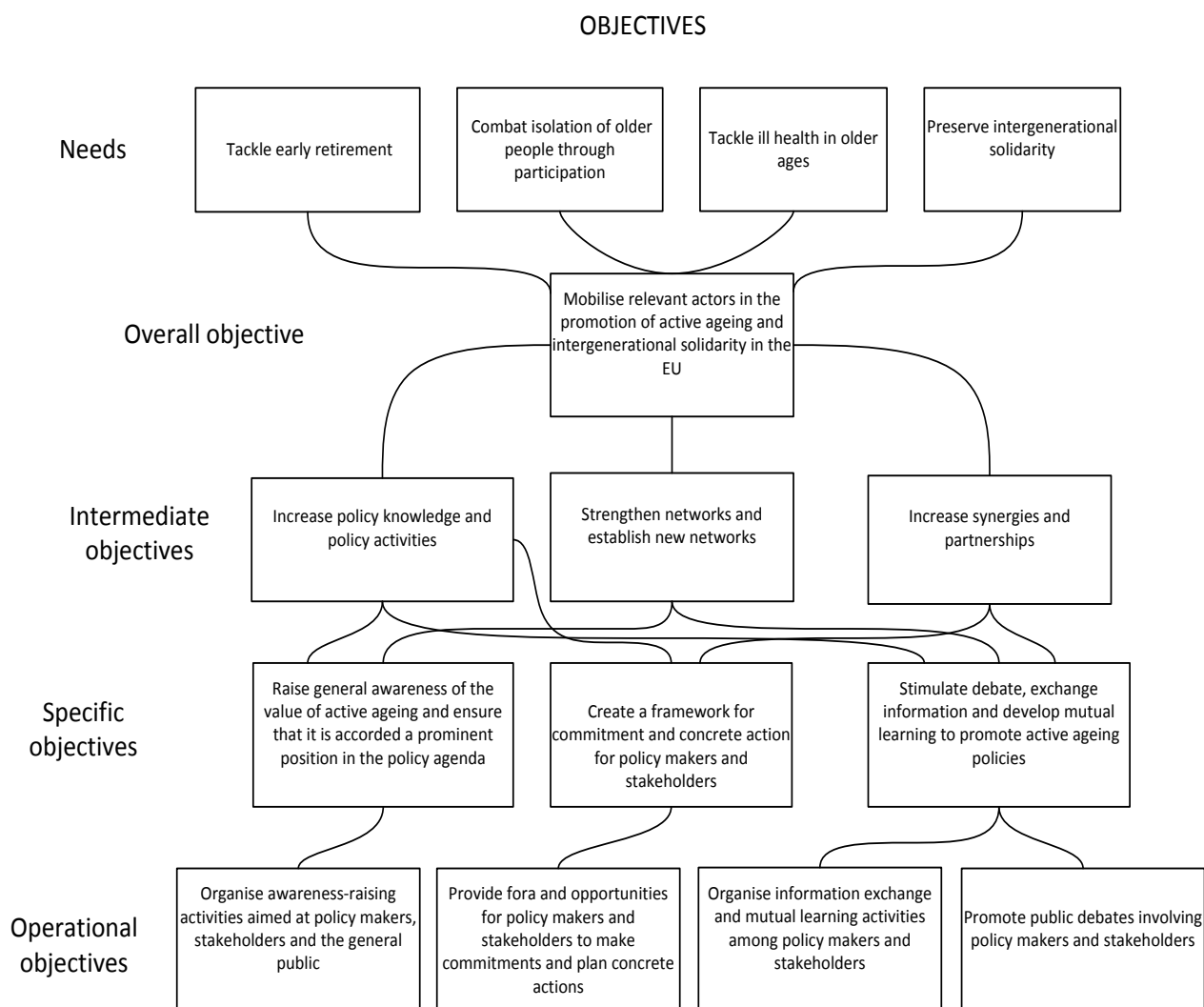
- to raise general awareness of the value of active ageing and ensure that it is accorded a prominent position in the policy agenda;
- to stimulate debate, exchange information and develop mutual learning to promote active ageing policies;
- to create a framework for commitment and concrete action by Union and Member states with the involvement of stakeholders<sup>30</sup>.

We adopt these as the **specific objectives**, but to fill a gap between them and the overall objective we identify a number of **intermediate objectives**, highlighting how the actors are mobilised: by strengthening the networks and establishing new networks when needed; by increasing synergies and partnerships between authorities and stakeholders, between governance levels, between generations; by increasing policy activity and policy knowledge.

Below the specific objectives, we introduce **operational objectives** showing what the Year concretely did to set in motion the objectives chain: organise awareness-raising activities, promote public debates, organise information exchange and mutual learning, provide fora and opportunities to make commitments and plan concrete actions.

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<sup>30</sup> This is a simplified text with respect to the text of Article 2 of the Decision: Decision No 940/2011/EU of the European Parliament and of the Council of 14 September 2011 on the European Year for Active Ageing and Solidarity between Generations (2012), OJ L 246/5 23.9.2011.



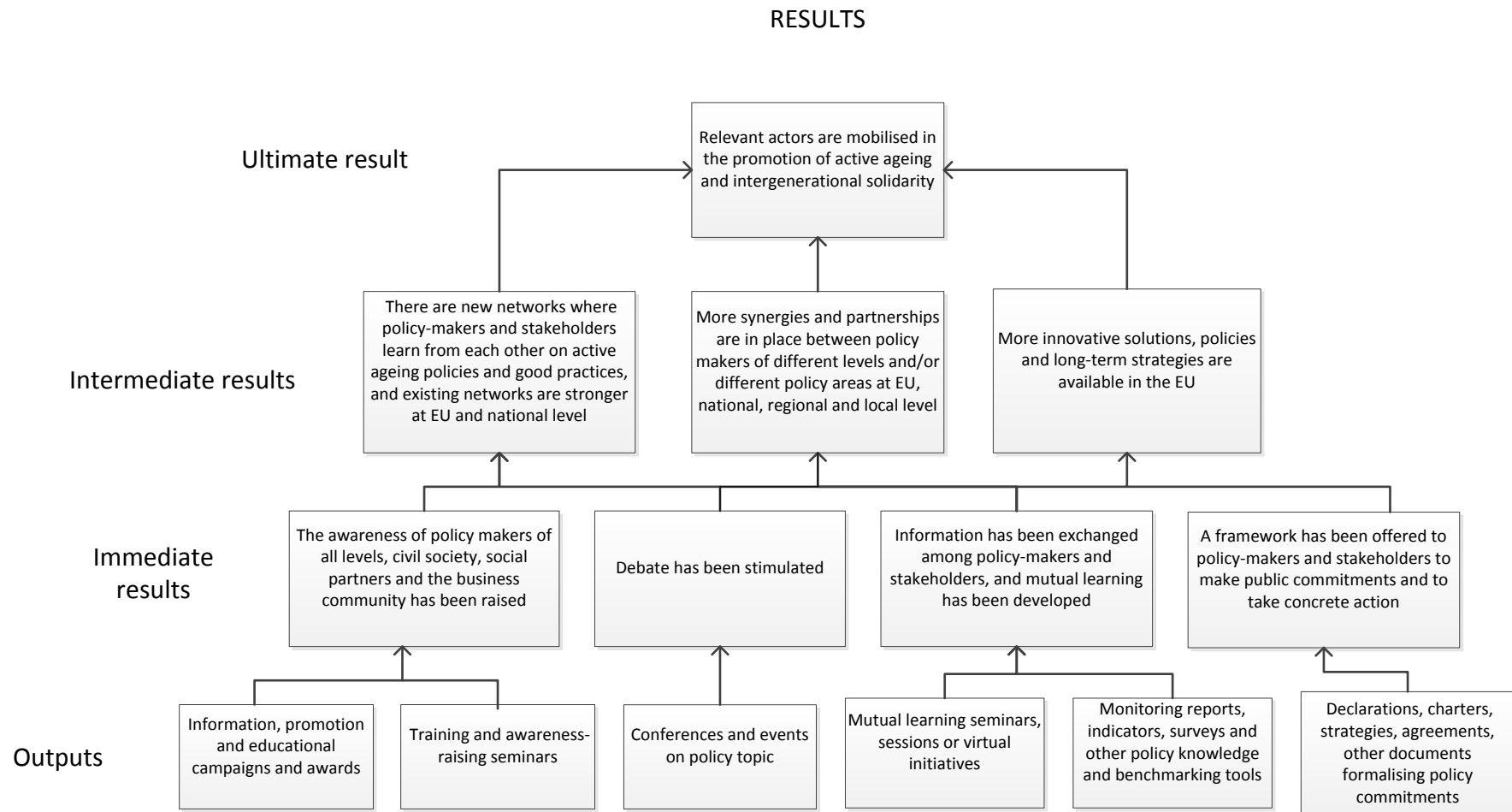
### 2.5.3 The results chain

The hierarchy of expected results parallels the objectives tree: the operational objectives can be assessed by seeing whether outputs were delivered. A non-exhaustive typology of **outputs** includes information, promotion and educational campaigns and awards, training and awareness-raising seminars, conferences and events, mutual learning seminars, sessions or virtual initiatives; monitoring reports, indicators, surveys and other policy knowledge and benchmarking tools; declarations, charters, strategies, agreements, and other documents formalising policy commitments. The intervention logic suggests that the delivery of outputs enables to achieve the **immediate results**, which mirror the specific objectives: they entail that the awareness of policy makers of all levels, civil society, social partners and the business community has been raised, debate has been stimulated, information has been exchanged among policy-makers and stakeholders, mutual learning has been developed, and a framework has been offered to policy-makers and stakeholders to make public commitments and to take concrete action.

By doing so, the Year will have likely attained the **intermediate results** (new networks where policy-makers and stakeholders stably and frequently learn from each other, existing networks are stronger at EU and national level, more synergies and partnerships are in place more innovative solutions, policies and long-term strategies are available in the EU on active ageing). These outcomes can be of course a result of mobilisation of actors as well as a means for it. Causal logic

has a limit here as there are obviously feedbacks in both directions. Instead of reducing the direction to one-directional causality, we prefer to keep into the model a complex, systemic approach. The **ultimate result** is formulated as achievement of the overall objective, e.g. relevant actors are mobilised in the promotion of active ageing and intergenerational solidarity. Such actors are those identified in the Decision, i.e. Member States, their regional and local authorities, social partners, civil society and the business community, including small and medium-sized enterprises (Article 2).





In the diagrams above, the distinction between EU and Member State level is not made explicit. All types of results apply to both the EU and national level. There may be of course also a cross-fertilisation between EU and National level (for example, participation in EU-level awards can raise the awareness of national civil society organisations).

### 3 Relevance and complementarity

In this section we address two evaluation questions related to relevance and complementarity:

- EQ1 - How relevant was the initiative to organise a specific European Year for the promotion of active ageing and solidarity between generations?
- EQ2 - How relevant were the EY2012's objectives, thematic priorities and types of initiatives?
- EQ7 - How complementary was the EY2012 with regard to other EU policies or policies in the Member States in the context of active ageing and solidarity between generations?

#### 3.1 Relevance of the overall theme of active ageing

The first question we must consider is the extent to which the theme of active ageing and intergenerational solidarity is relevant to the current needs of Member States and EU citizens.

##### Desk research

As the desk review material demonstrates (see section 2.2), the theme has been highlighted, in its various aspects, as both a major challenge (as a result of changing demographics) and opportunity (realising the potential of older people and the benefits associated with healthy ageing). The choice of promoting an European Year on Active Ageing and Intergenerational solidarity in such a way was highly relevant.

Perhaps the most significant developments prior to the Year, in terms of EU policy and policy documents, are represented by the "Intergenerational Solidarity for Cohesive and Sustainable Societies Conference", held during the Slovenian Presidency in 2008 (which called for a European Year on that theme); followed by the 2009 Ageing Report, which used budget projections to emphasise the serious economic and social implications of demographic change for Member States; and the consultation on the EY itself. The relevance of the theme is established not only by these important milestones but also by a range of research reports, high-level working groups, conferences and Council conclusions<sup>31</sup>. In recent years there has been a consistent EU message on this theme, underpinned by a portfolio of specific EU actions addressing particular aspects (for example on ICT and independent living; employment and health). The existence of a series of long-term measures prior to the Year (notably in the areas of technology, innovation and health) highlighted the need to bring the various facets together under one coherent banner (in order to demonstrate the linkages between the different sub-themes), and to provide a short-term boost in overall awareness, hopefully leading to longer-term effects.

Policy-makers in Member States have been acutely aware of the emerging financial and economic challenges associated with an ageing population, including how to support a growing number of retired people (by funding an increasing pensions bill) and a shrinking income-tax base (as a result of fewer people of 'working age'). However a key feature of the EU policy response has been to emphasise the positive potential of these changes as well – the benefits in terms of quality of life offered by new technologies, advances in medicine and opportunities for older people to continue leading fulfilling, dignified and 'useful' lives for much longer than ever before.

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<sup>31</sup> For a list of EU references, see Table 2-1.

The relevance of the EY2012 is therefore rooted in the following:

- Long-standing identification of the scale and importance of the issue (from at least 2007);
- The high degree of relevance to Member States, all dealing with similar problems (albeit in different contexts);
- The multi-faceted nature of the issue, covering a wide range of economic, technical and social issues;
- The need to link challenges and opportunities and highlight benefits, not just negative aspects.

## Interviews

Interviews with EU staff and a range of EU level stakeholders confirmed widespread agreement that the issues addressed by the EY2012 were relevant: demographic change, rising cost of pensions, health care and the need to find ways to help older people to stay active. There was also agreement on the need to overcome the negative image of ageing, in terms of its costs, and to raise awareness not just on active ageing but also on the contribution older people can make to society and the economy.

It was also clear from these interviews that the Year was heavily influenced by the spirit of the EU Presidency (the conference under the Slovenian presidency mentioned above) and the anniversary of the UN conference on Ageing. The timing was generally considered useful, although a minority argued that in terms of pertinence the issue of pension system reforms took place in 2009-2011, so having the Year in 2008-2009 would have been a more logical timing. However this view focuses on only one aspect of the Year. For most stakeholders, the Year would have been welcome in any year. For one EC representative the timing was considered useful, since the economic crisis highlighted the reality of the challenges posed by demographic change: the EY2012 was a contribution to increasing the visibility of ageing-related issues; encompassing both positive and negative aspects. The EY's value also lays in its strongly cross-cutting nature and consequent ability to link health and social issues together. A couple of stakeholders<sup>32</sup> found the EY2012 timely in promoting the theme of intergenerational solidarity specifically, after several years of crisis.

The interview evidence suggests that there was a need to **mobilise a range of actors** and in particular stakeholders agreed on the value of opportunities provided by the Year to work together on common recommendations; and to bring stakeholders together under one umbrella, including regions, employers, Member State governments and civil society organisations. The EY2012 was also seen as a 'symbolic' gesture, with mobilisation of the relevant actors as a central goal. The need to broaden the range of actors involved (beyond those specialised in ageing for example) was also widely supported through introducing the theme of Intergenerational solidarity; and involving not just demographers or age-related organisations. An example of this type of stakeholder inclusion applies to Eurocities – its members were not previously very active in this area but became so during the Year (through PROGRESS-funded research on demographic change). In common with most European Years there was also a need to mobilise industry.

The results of the interviews with stakeholders also highlighted the importance of the **preparation phase** of the Year, in particular the role of AGE platform in producing the active ageing Manifesto<sup>33</sup> and Roadmap<sup>34</sup>, in making the Year relevant and appropriate to respond to widespread needs.

In addition to the generally positive picture that emerged from the consultations there were also a limited number of criticisms among EU stakeholders concerning thematic coverage: that more could

<sup>32</sup> Interviews with ETUC and Eurohealthnet.

<sup>33</sup> Manifesto for an Age-Friendly European Union by 2020, [http://www.age-platform.eu/images/stories/23598\\_poster\\_everyone2012\\_v4.pdf](http://www.age-platform.eu/images/stories/23598_poster_everyone2012_v4.pdf).

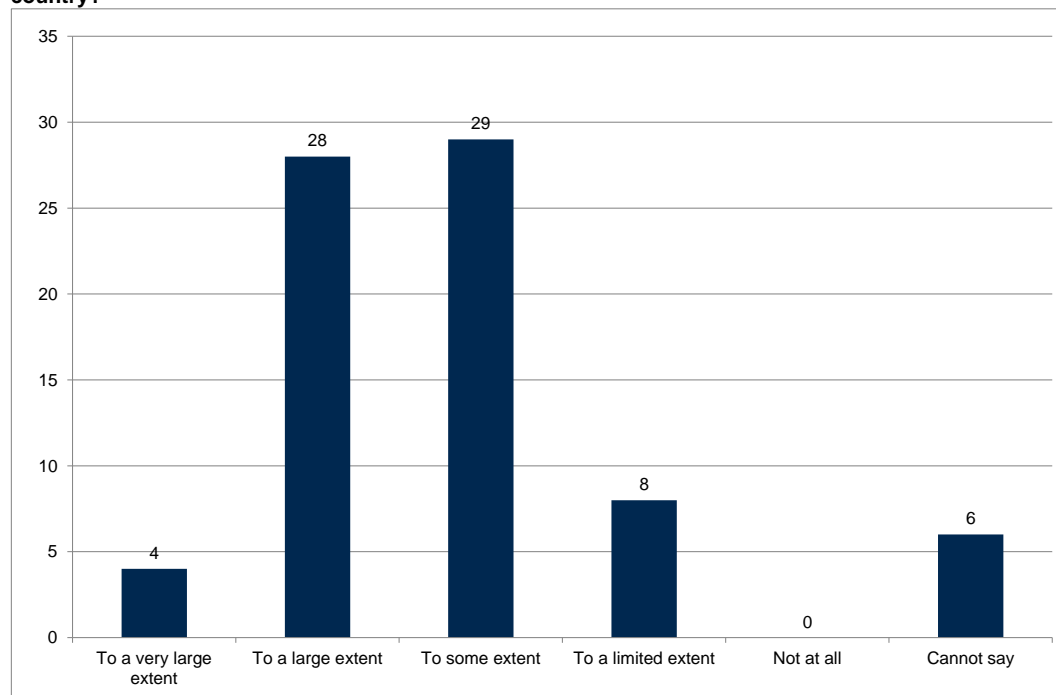
<sup>34</sup> [http://www.age-platform.eu/images/stories/EN/EY2012\\_Coalition\\_Roadmap.pdf](http://www.age-platform.eu/images/stories/EN/EY2012_Coalition_Roadmap.pdf).

have been done on discrimination; too large a focus on employment and not enough on poverty and social exclusion. Against the background of the continuing economic crisis national contexts played a role in some cases: “... although there was good will at a first level to do some steps in the EY2012 activities, it was a difficult year for Greece to do much”<sup>35</sup>.

### Survey

According to the results of the survey of national-level stakeholders the activities implemented were relevant to the needs of Member States (for 42.7% of respondents to a large or very large extent):

**Figure 3.1 Response of national stakeholders to the question: "To what extent do you think that these themes were addressed by the EY2012 activities in a manner that is relevant and appropriate for your country?"**



Source: National Stakeholders Survey.

Some examples of positive as well as critical comments of national stakeholders on the relevance of the Year are provided below:

**CSO, Finland:** “Activity for older people is always important and all these issues have been dealt with”.

**CSO, Malta:** “It created awareness about the subject. Measures also helped, especially the one making so that the pensioners will not lose their pension if they decide to continue working”.

**CSO, Hungary:** “In Hungary the government is not prepared yet to solve all those problems arise from the aging of the society”.

**EC Representation, UK:** “We managed to find the balance at national level that worked for us”.

**CSO, Slovakia:** “This topic should have been communicated more intensively and broadly given the demographic challenge Slovakia is now facing. Communication of this topic was more or less formal”.

**EC Representation, Slovenia:** “There could have been more focus on independent living (outside institutions for the elderly) and employment. The theme was somewhat overshadowed by the economic crisis and the consolidation measures- labour reform and reform of social protection mechanism by which the elderly, especially the more vulnerable groups, were affected. Perhaps too many activities focused on general and basic solidarity-type events: children visiting elder people etc.”.

**CSO Belgium:** “The themes addressed are rather ‘hot’ in Belgium. But they were not worked out properly”.

<sup>35</sup> Interview, Greek civil society organisation.

### 3.2 Relevance of choices on thematic priorities

The choice of the thematic priorities – employment, health and independent living, participation, intergenerational solidarity – was consistent with prior thematic analyses and policy activity conducted on active ageing at EU level and internationally.

In terms of the **thematic priorities** set for the Year these were a mix of long-term issues and issues of immediate concern (addressed by adding the Intergenerational component for example). The AGE Platform exercised a strong influence in defining the three themes and the transversal theme of intergenerational solidarity. The inclusion of solidarity between generations was also supported by the European Parliament which had already produced on 11 November 2010, a Resolution entitled 'Demographic challenge and solidarity between generations' and recalled it in the final Decision<sup>36</sup>.

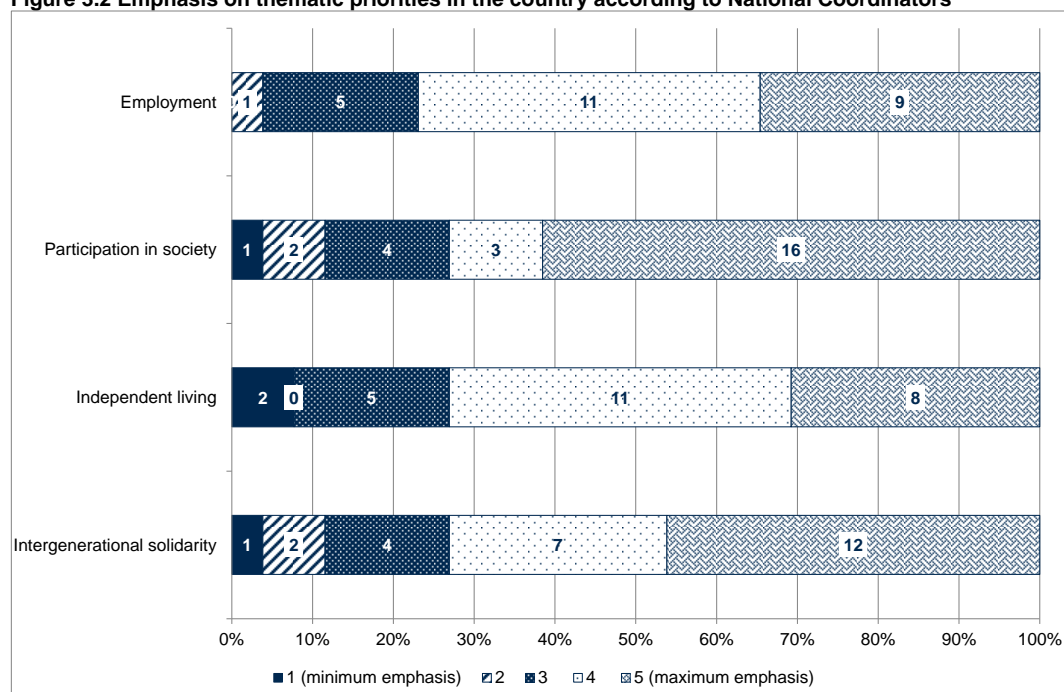
The evidence suggests that the topic of intergenerational solidarity was appealing to a wide range of people and organisations and the timing was also a factor (e.g. in the context of the economic crisis, debates about pensions etc.). The fact that the theme of the Year was broad enough to let several topics to be covered was welcomed by the stakeholders, including organisers and participants, allowing stakeholders to choose something relevant from their own point of view. Examples here included participation by local authorities (CEMR), health (Eurohealthnet) and highlighting the importance of developing a gender position on pensions (EWL). It was also highlighted that since the issue of the demographic challenge and active ageing emerged around 2006, the Year was the first significant 'joint effort' to tackle the issue at EU level.

Figure 3.2 below shows the extent to which the four main themes of the Year were emphasized in country programmes according to National Coordinators (respondents could attribute a value from 1 – minimum emphasis – to 5 – maximum emphasis – to each of the four thematic priorities).

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<sup>36</sup> Decision no 940/2011/EU of the European Parliament and of the Council of 14 September 2011 on the European Year for Active Ageing and Solidarity between Generations (2012).

**Figure 3.2 Emphasis on thematic priorities in the country according to National Coordinators**



Source: National Coordinators Survey.

The theme that received maximum emphasis in most countries is **participation in society**, followed by **intergenerational solidarity**. However, all themes received high emphasis (4-5) according to three quarters of respondents.

In the table below we provide some examples of how some national programmes put emphasis on the one or the other thematic priority.

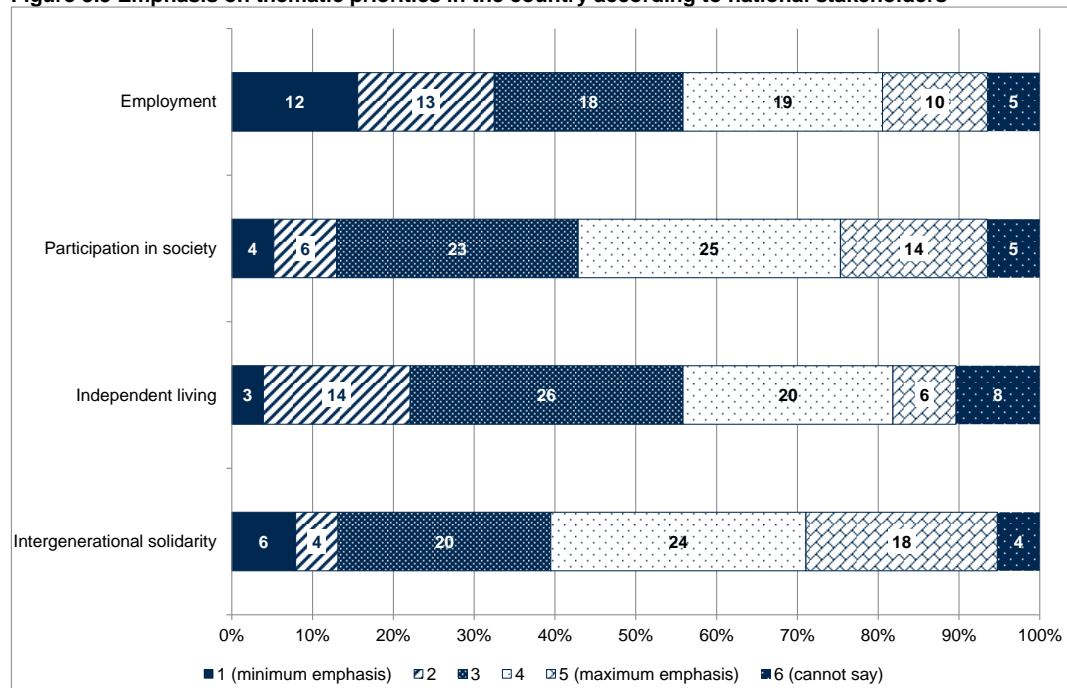
**Table 3-1 - Examples of thematic focus of national programmes**

Country	Themes emphasized in the work programme
BE	The employment rate of people in the age group of 55-64 is lower than in the EU. Therefore there is a strong focus on increasing the employment of elderly.
BG	Bulgaria reports a relative low life expectancy and a relative high mortality rate. As a result, Bulgaria had a specific focus on creating better services ("quality care") and healthier living.
EE	In the Working Programme of Estonia it is mentioned that a specific focus is on creating opportunities to make society more tolerant, more responsible, more caring and more coherent. Thus there is a clear focus on participation.
FI	Using the concept of active ageing, the focus is both on everyday life and work. However, the Work Programme explicitly deals with preventing social isolation and the maintenance of social, psychological and cognitive performance. There thus seems to be a specific focus on participation and independent living.
IT	The Work Programme identifies several main topics, which are mostly related to participation of elderly. Examples are the promotion of lifelong education, improving urban mobility and infrastructure and a transfer of knowledge from elderly to younger people.
NO	In the Work Programme, it is explicitly stated that in Norway, the focus is placed on increasing labour force participation among seniors. However, activities in the other themes are also encouraged.
PL	Specific focus is on participation, specifically preventing marginalisation of older people.

Source: national work programmes

The survey of stakeholders provides the same indication. This evidence is broadly consistent with the results of our analysis of the database of initiatives (see Figure 3.3).

**Figure 3.3 Emphasis on thematic priorities in the country according to national stakeholders**



Source: National Stakeholders Survey.

### 3.3 Relevance of objectives

The relevance of the **objectives** chosen for the EY2012<sup>37</sup> was generally uncontroversial, these objectives simply mirror the needs and policy priorities already agreed by Member States and set out in the various preceding policy documents. The objectives also recall those of the previous Years (EY2010 for example) and reflect the limitations on the EU's leverage, for example given that the Commission only has the power to 'coordinate' on social issues.

Some interviewees added elements regarding the specific interpretation to be given to the needs that are behind the objectives of the Year. For example, the AGE Platform representative highlighted the need to use the Year to stimulate long-term commitment and concrete action as *opposed to 'mere celebration'*, and the Commission representative of the EY team specified that the *focus for awareness raising was on policy makers and NGOs (as multipliers) rather than on the general public*. A similar interpretation was shared by the CEMR representative who reported that raising awareness on demographic change was important *for regional and local authorities*. A different interpretation to the need for awareness-raising was provided, instead, by the representative of the European Parliament who underlined the importance of raising awareness among citizens on demographic shifts.

The results of the survey of NCs highlight the priority given by stakeholders to raising awareness (respondents tended to rate this issue as 'very urgent' more often than they did so with information exchange and mutual learning; see Figure 3.4). This does not however imply any lack of urgency to

<sup>37</sup> With reference to the logic model above the specific objectives were aimed at raising general awareness, creating a framework (for commitment and action), and stimulating debate and exchange of information.

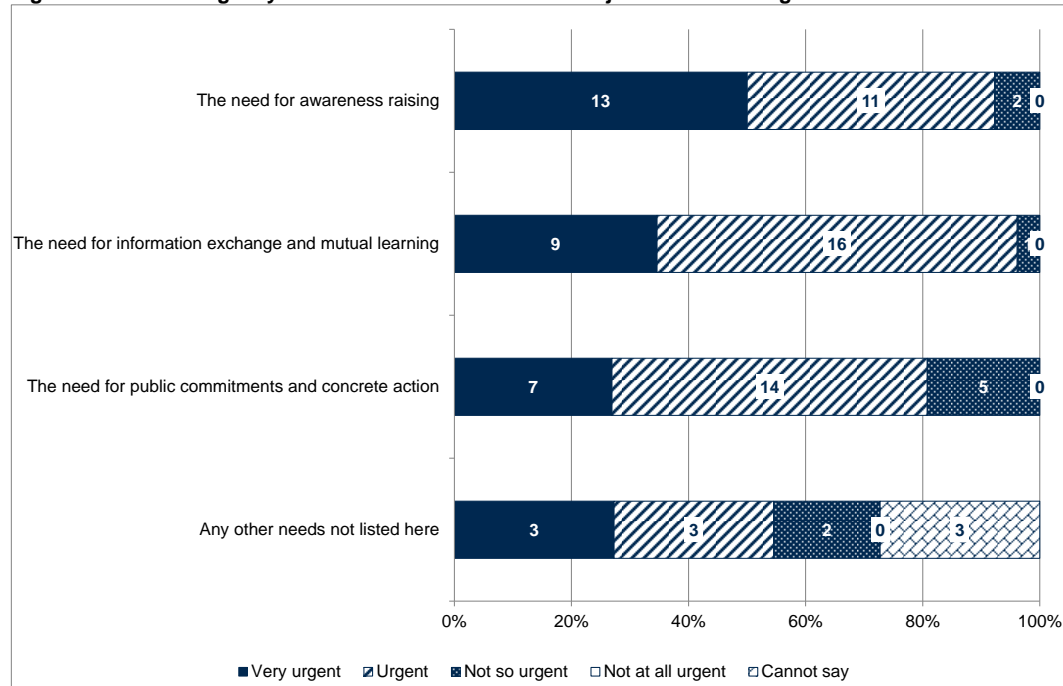


translate research and policy aims into concrete actions (a strong thread that emerges from the open comments received).

“All these dimensions are of major importance in our country, considering development gaps at various levels and the need to contribute to a sensitisation of the public opinion with respect to ageing, but concrete action and policy measures to promote the improvement of living conditions of senior people are equally important” (National Coordinator, Portugal).

“It is an urgent matter to transfer results of research and studies within the field of active ageing to the operational level (National Coordinator, Sweden)”.

**Figure 3.4 Rate of urgency of needs reflected in EY2012 objectives according to National Coordinators**



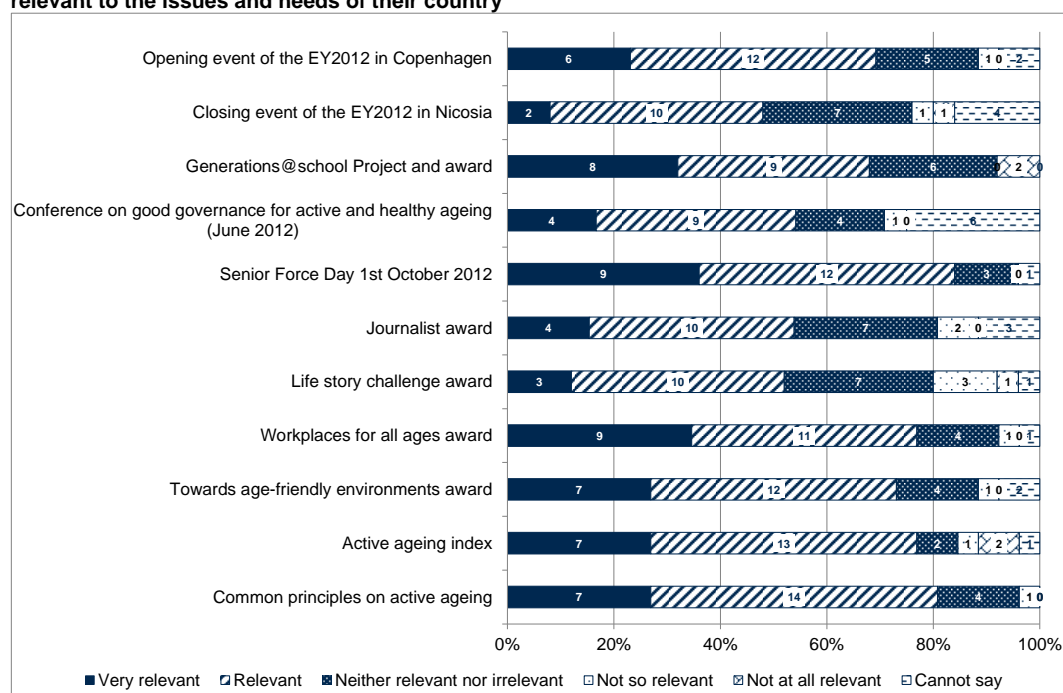
Source: National Coordinators Survey.

### 3.4 Relevance of type of initiatives

The evaluation also needs to consider the appropriateness of the **types of initiatives and activities chosen** to implement the EY2012. Certain elements are ‘standard’ for European Years (opening and closing events led by EU Presidency countries for example and a series of national launch events supported by the communications contractor). The evidence indicates that the types of activities undertaken were relevant to the needs of Member States and EU citizens, since most of the National Coordinators considered them appropriate to address the issues and needs of their countries in relation to active ageing (Figure 3.5). Members of the Stakeholders’ Coalition that were interviewed suggested that care was taken to ensure the ‘right’ participants were invited and some initiatives provided “*key political moments*”<sup>38</sup>.

<sup>38</sup> Interviews with two EU level stakeholders.

**Figure 3.5 Extent to which National Coordinators found the format and contents of the EU initiatives relevant to the issues and needs of their country**



Source: National Coordinators Survey.

The initiatives organised at EU level were considered relevant or very relevant by the majority of National Coordinators, with some variation.

The Active Ageing Index and the Common principles were considered relevant by the vast majority of National Coordinators.

Among the awards, the ones on workplaces for all, age-friendly environments and Generations@school were considered more relevant by a larger number of National Coordinators than the Journalist award and the Life story challenge award. The relevance of Generations@school can be also grasped by the feedback collected via the related case study (see Annex I), that most participating schools already had a propensity to become involved, through previous experience, a pre-existing high level of interest in the subject area (inter-generational solidarity or the European dimension) and the existence of concrete opportunities (schools in Austria and Ireland mentioned the proximity of the school to a nursing home, and this was also a focus of activity in the Polish and French schools examined). The award was therefore the end point of a mobilisation started at the local level.

Among the events, The Seniorforce Day and the Opening conference in Copenhagen were considered relevant by a larger number of NCs than the closing event and the conference on good governance (on both these last events, though, some Coordinators did not feel able to express themselves). According to the communication contractor, the Seniorforce Day did not attract though the same degree of enthusiasm as Generations@school, as a result of implementation challenges and potentially since the format was not as clear.

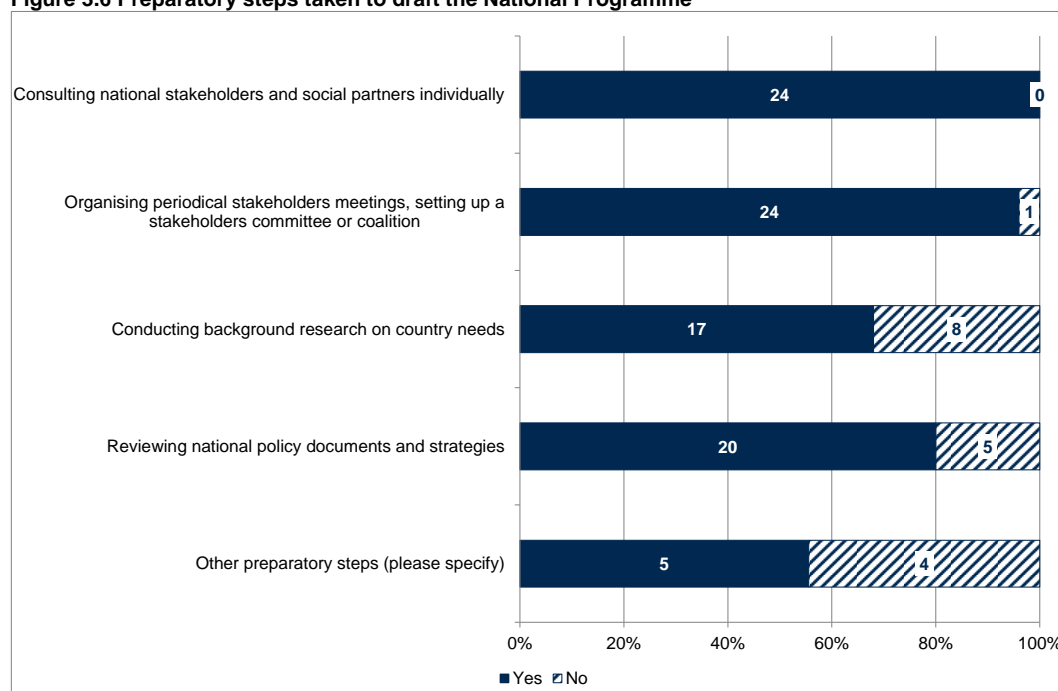
### 3.5 Preparatory steps as a factor increasing relevance

An indirect indicator of relevance is provided by the several preparatory steps that were taken to draft the EU and national programmes.

At EU level, the evidence from consultations with the EC, Stakeholders coalition members and the communications contractor suggests a well-planned and productive collaboration process between these three parties in terms of designing the programme of the Year to best deliver on the objectives. For example, at an early stage some of the larger public events were dropped and a few new elements introduced, such as the Generations@school initiative. The focus on multipliers was not driven by a denial of the need to raise awareness among the general public (for example to change negative attitudes towards ageing, or about demographic shifts), but rather by the requirement to make best use of the limited budget available (campaigns aimed at the general public require significant financial resources, way beyond the resources that were available for communications activities).

At the country level, national programmes were drafted<sup>39</sup> based on an analysis of existing needs as revealed by Figure 3.6 based on the survey of National Coordinators.

**Figure 3.6 Preparatory steps taken to draft the National Programme**



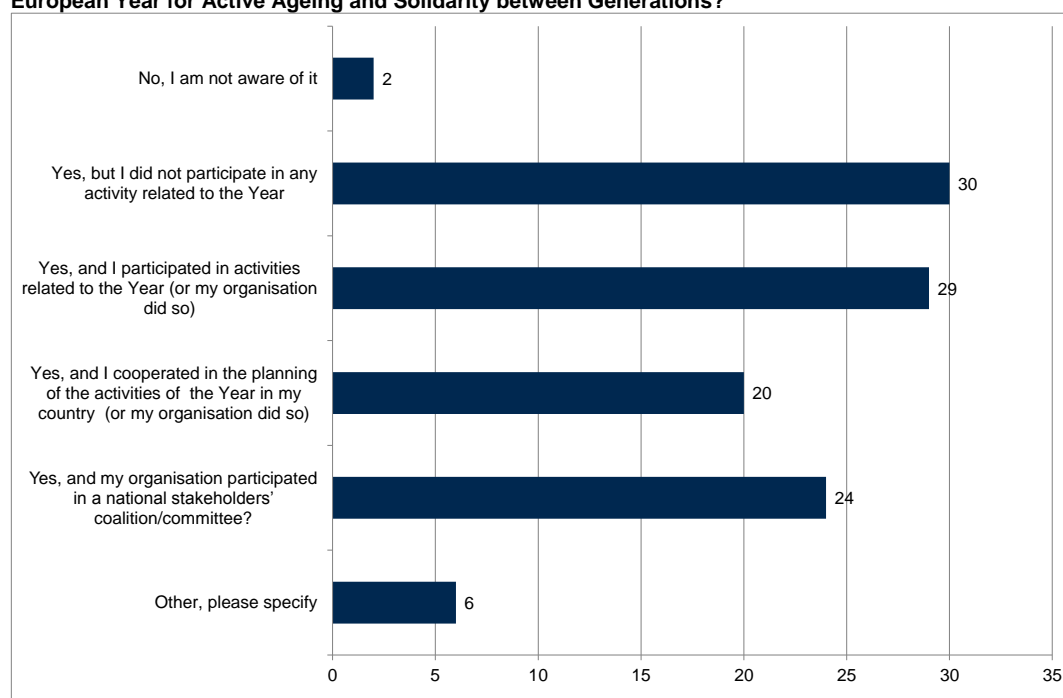
Source: National Coordinators Survey.

All National Coordinators who responded to the survey had consulted relevant national organisations on the country programme and all but one organised periodical stakeholders meetings, setting up a stakeholders committee or coalition. Four fifths also reviewed national policy documents and strategies while two thirds conducted background research on country needs.

The results of the survey of national stakeholders suggest a relatively high level of awareness of the designation of the EY2012 (see Figure 3.7 below) which is perhaps the result of the consultation process and preparatory steps described above.

<sup>39</sup> National Work Programmes are all available at this webpage: <http://europa.eu/ey2012/ey2012main.jsp?catId=986&langId=en>

**Figure 3.7 Response of national stakeholders to the question: "Are you aware that 2012 was the European Year for Active Ageing and Solidarity between Generations?"**



Source: National Stakeholders Survey.

### 3.6 Complementarity to other EU policies or policies in the Member States

As set out in section 3.2, the Year encompassed a range of sub-themes and one of the main drivers behind it was to bring together the various policies, programmes and other developments under one 'banner'. Scope for **complementarity** was therefore significant. Based on the policy documents examined in section 2.2.1 one could argue that some form of policy complementarity was already in place before the Year, but as evaluators we are also interested in the extent to which there was a further impulse to complementarity with the Year, at EU and at country level.

#### 3.6.1 EU level

Both interviews and the desk research indicate that at EU level, there was strong complementarity between the Year and other ongoing policy activities. In DG EMPL the EY2012 was complementary to the White Paper on Pensions (the EY supported the message that working lives have to be extended) and the Demographic Forum (which addressed active ageing in 2010, but was postponed from 2012 to 2013, for practical reasons and also to take into account the Social Investment Package). Externally to DG EMPL, the Year had most complementarity with the activities of DG SANCO (via its 2<sup>nd</sup> Health Programme and the Innovation Partnership on Active and Healthy Ageing developed with DG CONNECT), DG JUST (via the Accessibility Act, a legislative initiative to ensure that goods and service are accessible to people with impairments). There was also interaction with DG EAC and DG RTD, although it was reported that the most frequent contacts were between DG EMPL and DG SANCO. The consultation evidence suggests the Inter-service Group established to facilitate collaboration between DGs worked well.

The evidence from interviews with Commission officials highlighted the high degree of relevance of the EY to two DGs in particular: SANCO and CONNECT. This reflects the long-established track

record that these two DGs have in delivering relatively large-scale initiatives in the areas of ageing and health<sup>40</sup>. (DG SANCO had been driving change for some years prior to the EY2012 and the Year was particularly relevant as a dissemination tool, conveying the message that ageing is not just about social policy, but also includes prevention and the need to achieve health impacts. The Year helped to make the necessary connections between these themes.

DG SANCO helped to organise a number of events during the EY and disseminated information about their policies and initiatives in the field. The approach adopted was one of a facilitator of the EY – to complement the main ‘flagship activities’ of DG EMPL by including other relevant initiatives. A key conference from DG SANCO’s perspective was one on developing strategies for national/regional/local levels specifically aimed at engaging with those constituencies (which is normally rather challenging for the Commission)<sup>41</sup>. A key goal for SANCO was to ensure that active ageing and health were closely linked (active and healthy ageing).

In terms of the preparations for the Year, DG CONNECT was also able to share its expertise and experience with SANCO, JUST, EMPL etc. through a Commission Inter-service Group. Here again, because the theme has been an integral part of DG CONNECT’s activities for at least eight years, this DG was well placed to contribute on how to use technology to support active and healthy ageing. This includes large-scale initiatives based around innovation, services and social inclusion. For example the DG CONNECT sponsored ‘European Innovation Partnership on Active and Healthy Ageing’<sup>42</sup>, comprises a large consortium; but needed work to translate it into different national contexts, and to find a European approach and stimulate the sharing of best practices. Linking the Partnership to the Year helped to address these issues and to build an evidence base to support such large-scale initiatives.

### 3.6.2 Country level

The evaluation found multiple instances at which the EY 2012 was clearly complementary to other EU or MS policies. The issue of active ageing and intergenerational solidarity as it was defined in the Year – including employment, independent living and participation – involves as a minimum the policy domains of employment, education and health. In addition, the topic affects the whole EU. All Member States face significant demographic changes. There are however Member States with extensive active ageing policies and Member States with less developed ones. The EY2012 proved complementary in the sense that - among others - it refined national policy agendas and stimulated the exchange of practices between countries. These initiatives have been financed via EU and national resources. In the following paragraphs we provide further details and evidence on this aspect of the Year.

#### *Funding instruments*

Given the absence of dedicated EU funding for EY2012 initiatives, national programmes were funded through other EU or national sources. In about half of the countries, EU funds provided opportunities to finance EY2012 initiatives. Often existing activities funded by the EU, e. g. under the ESF or the Grundtvig programme, were incorporated in the EY2012 programme and labelled as EY2012 activities. For instance, in Portugal the RUTIS (Third Age Universities association) concluded with an exchange event in 2012 the national activity of an EU project called Cultural

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<sup>40</sup> E.g. European Commission, DG INFSO and Media: Communication: Ageing well in the Information Society, an i2010 Initiative: Action Plan on Information and Communication Technologies and Ageing, 14 June 2007; e-Health - making healthcare better for European citizens: An action plan for a European e-Health Area, COM (2004) 356 final; European Innovation Partnership on Active and Healthy Ageing.

<sup>41</sup> “Good governance for active and healthy ageing” (Brussels, 4 June 2012)

<sup>42</sup> [http://ec.europa.eu/research/innovation-union/index\\_en.cfm?section=active-healthy-ageing](http://ec.europa.eu/research/innovation-union/index_en.cfm?section=active-healthy-ageing).

Bridges, funded under the Grundtvig Programme. In Poland, the organisation of a three-day conference by the Foundation for Women's Issues was partially financed via Grundtvig. The EY2012 proved herewith complementary to the LLP, Grundtvig and some ESF initiatives for employability.

Organisers also used national financial instruments. While the usage of these national instruments certainly involved the incorporation of already existing activities and the relabeling of these, cases of redirecting resources are also known. In Poland for example, the financial means for EY 2012 initiatives were made available from a financial envelope that was originally exclusively dedicated to Universities for the third Age (UTAs). In cooperation with various NGOs working in the field of active ageing, the Polish government decided to use this envelope also for EY2012 activities that were outside the scope of the UTAs. In such cases the EY2012 proved complementary to national funding instruments.

More importantly, the Ecorys survey among National Coordinators indicates that it was recognised as possible to fund active ageing policies through EU funds. A vast majority of National Coordinators stated that they discussed the possibility to fund active ageing activities via EU funding instruments, in particular the LLP, ERDF, ESF and Progress. For instance, in Poland the activities that will be implemented through the Programme on Social Activity for the Elderly 2014-2020 will be (partially) financed via the ESF. National instruments were mentioned to a much lesser extent as a potential sources of funding. In the following table we provide an overview of the countries where various EU funding mechanisms were considered.

**Table 3-2 Countries where in any of the EY2012 activities it was discussed how to promote active ageing through EU funding**

Funding instrument	Countries where it was considered
European Social Fund	AT, FI, NL, EE, FR, SK, DK, BE, RO, SI, BG, GR, CY, SE
Lifelong Learning Programme	AT, FI, SK, DK, IT, RO, SI, GR, CY, UK
European Regional Development Fund	FI, EE, IT, RO, SI, CY, SE, UK
PROGRESS	FI, FR, SK, DK, BG, CY

Source: National Coordinators Survey.

#### *Volume effects*

The EY2012 clearly increased the number of initiatives for promoting active ageing in the Member States. 19 out of 24 National Coordinators stated in the Ecorys survey that new initiatives promoting active ageing were launched, which was at least to some extent due to the EY2012. This is not surprising since a similar share of respondents (18 out of 24) stated that the EY2012 caused - at least to some extent - active ageing to appear higher on the national policy agenda.

Also activities previously implemented in one or few Member States were extended to more Member States. About one fifth of the National Coordinators indicated in the Ecorys survey that their EY2012 was inspired by practices from other Member States. In Estonia for example, a study on mapping labour market services for the elderly conducted in other Member States was used to identify good practices for implementation in Estonia. In the Czech Republic moreover, the project on «surrogate grandmothers» was largely inspired by the Austrian «*Oma Dienst*» to link elderly women to families and to take care of their small children.

#### *Process effects*

The EY2012 also strengthened the knowledge and skills of stakeholders involved in the organisation of the Year. This occurred for example through the set up of stakeholder coalitions at

Member State level or through knowledge-sharing events like conferences. In Sweden for example, the National Institute for Public Health organised a conference on how to set up guidelines on healthy active ageing and to promote the exchange of experiences between countries, local authorities and NGOs. In Poland moreover, a long-term Programme on Social Activity for the elderly 2014-2020 was drafted by a Council for Senior Issues. This Council comprised about 50 NGOs working with elderly persons and the Polish Government. Neither such a council nor such a long-term programme for the elderly existed before in Poland.

Furthermore, the EY2012 offered the opportunity for actors from other Member States to become involved in national activities. About one fifth of the National Coordinators stated that they involved organisations from other EU Member States in national events. In some countries the involvement of actors from other Members States in activities was quite visible. In the Czech Republic for example, the initiative "Active ageing as answer to overcome the crisis in the Czech Republic and Europe" was implemented by the Prague City Council in cooperation with the European Development Agency. In addition, the Slovak Centre for Labour, Social Affairs and Family participated in the project "Central European Knowledge Platform for an Ageing Society that involved organisations from eight different Member States. Such modes of cooperation were also achieved by involving European umbrella organisations like the Age Platform in the implementation of activities by their national member organisations.

#### *Innovation, agenda-setting, and learning effects*

The EY 2012 strengthened the national policy agenda in countries with an already existing national agenda on active ageing and intergenerational solidarity. In Austria for example, a Seniorenplan was created to set out the future of active labour market policies on increasing the employability of elderly workers in the age group 55-64 to ensure the sustainability of the pension system.

The EY2012 also yielded added value to national policies via the dissemination of innovations. In the Czech Republic for example a private company developed an application to aid elderly persons with hearing problems but who are unable to afford ordinary hearing aid devices. In the Netherlands, the Dutch MEP Lambert van Nistelrooij participated together with Commissioner Neelie Kroes in a showcase of "Ambient Assisted Living (AAL)" in Eindhoven. AAL foresees houses with ICT equipment and robotics for the elderly. Finally the See-Green project linked exclusion of elderly persons with another topic of increased importance: the green economy. This project trained elderly persons in the possibilities and developments of energy efficiency via an extended training systems and e-learning platform.

Innovative elements of the EY2012 also followed from the use of social media by National Coordinators and national stakeholders. In Spain for example, Facebook and Twitter accounts were created to share and disseminate information on the EY2012. In the Spanish evaluation it was estimated that about 700K people were reached through these channels. In Portugal, the Facebook EY2012 page received 1210 likes.

Innovative solutions for active ageing were promoted during the EY2012 in various areas, such as technological innovation and innovative ways of organising and delivering services for the elderly. These are also discussed in chapter four on effectiveness.

#### *Scope effects*

18 out of the 24 National Coordinators stated in the Ecorys survey that the target groups of active ageing policies were broadened and that this was to a large extent an effect of the EY2012. This was achieved by for example extending initiatives to both sexes. In Poland, physical exercise activities that were previously organized by Espar 50+ for women, became also accessible for men.

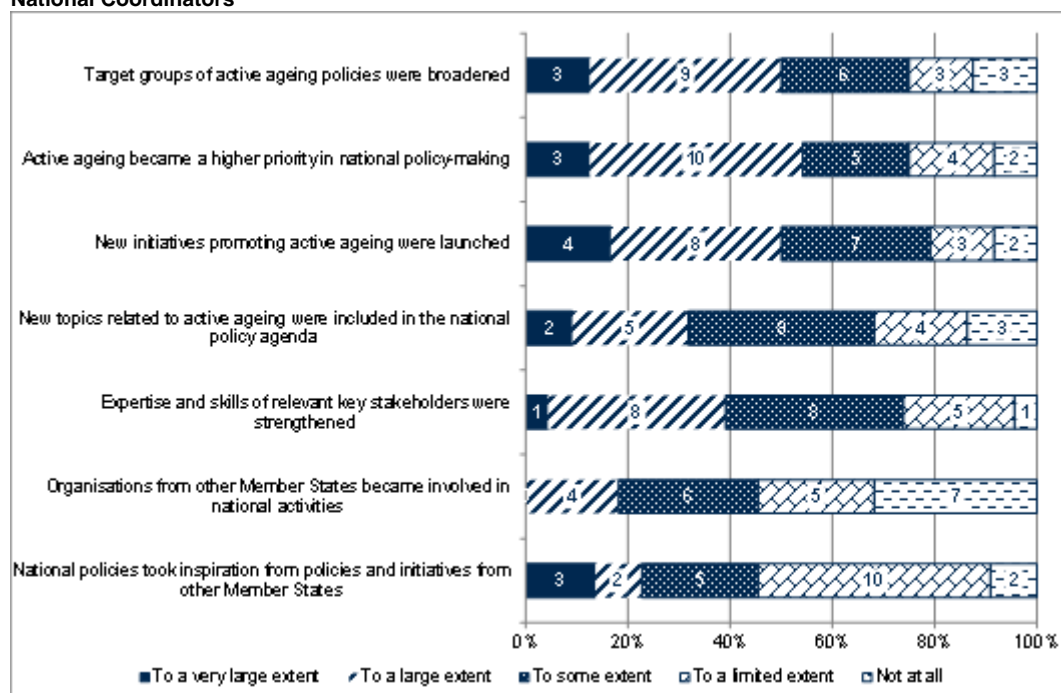
In addition, Espar 50+ broadened the target group of their activities to younger people with the organisation of the “Señorada: a picnic for young and old”.

In addition, scope effects were also achieved by the inclusion of new topics on the national policy agenda via a more holistic approach to active ageing and intergenerational solidarity. Whereas the issue of active ageing was previously mainly confined to health policies and/ or employment policies, the issue is now addressed via multiple policy areas. Member States did attach equal importance to all themes of the EY2012, i.e. health, independent living, employment, participation and intergenerational solidarity. In Portugal for example, active ageing was previously tackled by the Health Ministry and now is covered by all ministries.

The application of this holistic approach was confirmed by 15 out of 22 National Coordinators who stated in the Ecorys survey that new topics related to active ageist ageing were included on the national policy agenda. This occurred also in Poland where about 50 different NGOs working with the elderly were invited to cooperate with the Ministry of Labour and Social Affairs to define the national policy agenda. This agenda clearly exceeded the issue of educating the elderly through UTAs, the main objective of the EY2012 initially considered by the Ministry.

Figure 3.8 provides an overview of the extent to which the EY2012 reinforced the national policies for active ageing according to the National Coordinators.

**Figure 3.8 Countries where volume, scope, process and innovation effects were achieved according to National Coordinators**



Source: National Coordinators Survey.

The detail of the countries reporting these effects to a very large or large extent is provided in the table below.

**Table 3-3 Countries where volume, scope, process and innovation effects were achieved according to National Coordinators**



Effect	Achieved to a very large extent	Achieved to a large extent
Target groups of active ageing policies were broadened	EE, IT, HU	AT, BE, DE, LT, MT, PL, PT, SI, SK
Active ageing became a higher priority in national policy-making	EE, FR, PL	AT, BE, BG, DE, ES, MT, NL, RO, SI, SK
New initiatives promoting active ageing were launched	EE, ES, HU, IT	BE, BG, DE, LU, MT, PL, SI, SK
New topics related to active ageing were included in the national policy agenda	EE, PL	BE, BG, DE, ES, SK
Expertise and skills of relevant key stakeholders were strengthened	ES	BE, BG, DE, EE, PL, RO, SE, SK
Organisations from other Member States became involved in national activities	-	AT, BE, DE, SI
National policies took inspiration from policies and initiatives from other Member States	EE, FR, SI	BE, RO

Source: National Coordinators Survey.



## 4 Effectiveness and impact

In this section we address the following evaluation questions:

EQ3 - To what extent did the EY2012 deliver the expected results?

EQ4 - Which target groups were reached best? At which level?

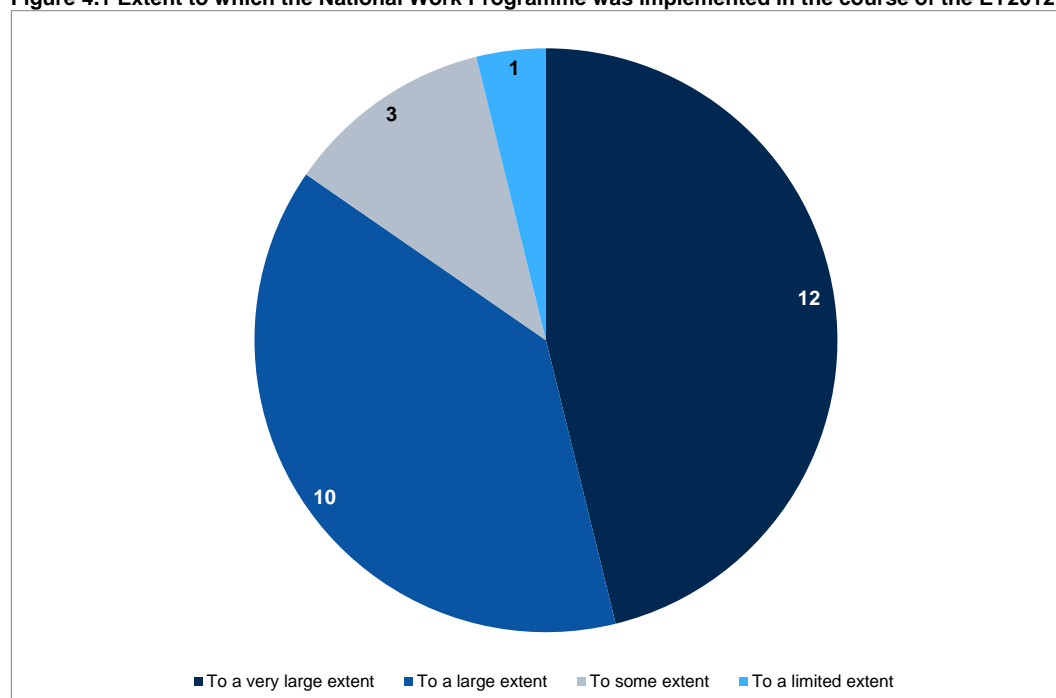
EQ5 - What were the main impacts of the EY2012?

EQ 6 - How and to which extent did major European events contribute to achieving the EY2012s objectives?

### 4.1 Outputs and the achievement of immediate results

Based on the information collected from National Coordinators, the plans made in the National Programmes were respected “to a large extent” in a vast majority of countries (22). The only exceptions were France, Finland and UK, which stated that the programme was delivered to some extent, and Malta, which did so to a limited extent.

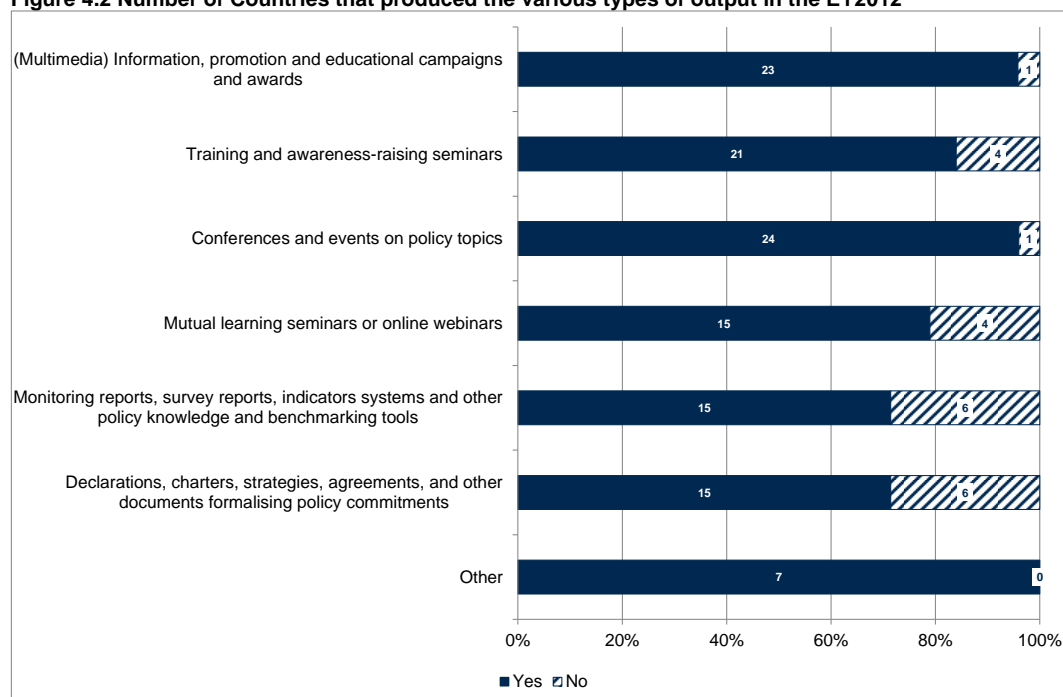
**Figure 4.1 Extent to which the National Work Programme was implemented in the course of the EY2012**



Source: National Coordinators Survey.

It is significant that all the types of outputs considered in the intervention logic (see section 2.5.3) were produced in at least half of the participating countries – showing a richness and variety in the programmes. The outputs linked to communication and awareness raising (information campaigns, training and awareness-raising seminars, conference and events) were the most often delivered; two thirds of respondents also mentioned knowledge outputs like mutual learning seminars, reports, surveys; a similar share reported the delivery of outputs formalising policy commitments (see Figure 4.2).

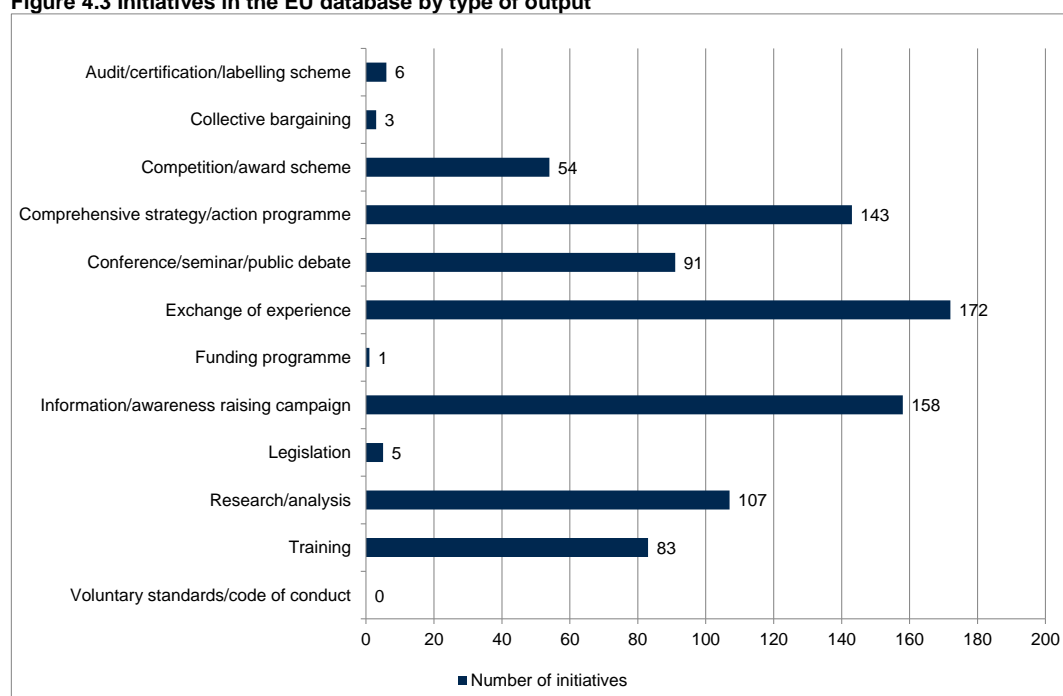
**Figure 4.2 Number of Countries that produced the various types of output in the EY2012**



Source: National Coordinators Survey.

The prevalence of awareness-raising and information sharing outputs over policy and research outputs is confirmed by the analysis of the distribution of initiatives recorded in the EU database by type, as is shown in Figure 4.3.

**Figure 4.3 Initiatives in the EU database by type of output**



Source: National Stakeholders Survey.

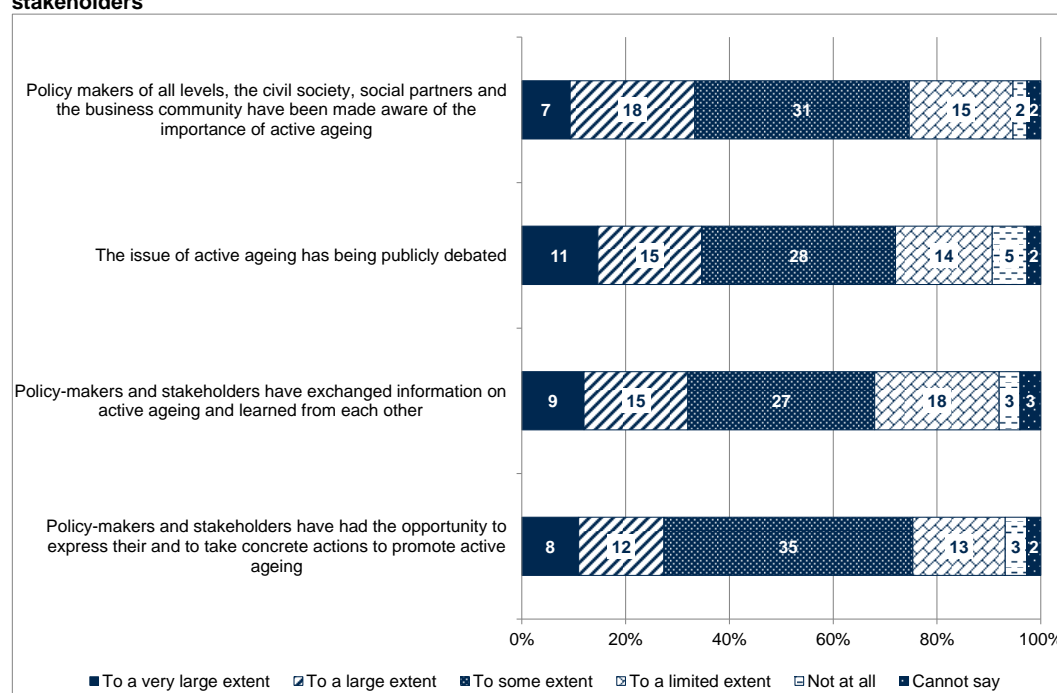
143 strategies or action programmes are included, many of which local in nature and aimed at setting a broad agenda for active ageing rather than planning specific policy measures, as in the following examples:

**A Policy for the Elderly: “Rethink Age - Gain Future” - Hessen (Germany).** In September 2011 the Hessian State Government initiated a social policy especially for senior citizens under the title “Rethink Age - Gain Future”. Within this framework, the Hessen Ministry of Social Affairs has designed a series of discussion panels in which associations, organisations and institutions from the social and economic sector discuss the current situation of the elderly and focus on future challenges which the state has to face due to the demographic change. The results of these discussion panels generated an action plan which was to be introduced in spring 2012.

**Austria's Seniorenplan - Austria / Wien(Austria).** The Seniorenplan is a strategic document on the social integration and the enhancement of quality of life of senior citizens in Austria. It was presented on May 29th at the Federal Parliament in Vienna, at the symposium “Active Ageing – The Austrian Way”. The core parts of the Seniorenplan are, according to the minister, to maintain the long-term security of the pension systems and the high standards of care, since they constitute the material basis for all the other blocks. This document was prepared in collaboration with the Federal Senior Citizens Advisory Council (Bundesseniorenbeirat), an institutionalised discussion forum for the dialogue between political decision makers and the representatives of the senior citizens' organisations on issues specific to senior citizens which are of general significance in Austria.

The **expected immediate results** can in our view be considered partly achieved. We have to moderate our positive assessment (based on our examination of information collected from National Coordinators and the website) in light of the mixed opinions of national stakeholders. A percentage of national stakeholders ranging from 27% to 35% considers the immediate results of the Year achieved in the country “to a large or a very large extent” and from 22% to 28% consider them achieved “to a limited extent or not at all”; the others take an intermediate position pointing to partial attainment or did not reply. Figure 4.4 below demonstrates the number of national stakeholders who chose each option, while in the subsequent Table 4-1 we provide the results by type of stakeholder. The percentage of positive, negative or intermediate responses varies by type of stakeholder, however there is no single type of stakeholder that indicated in majority (at least 50% of respondents) that any of the immediate results was achieved to a very large or large extent.

**Figure 4.4 Extent to which the EY2012 achieved its expected immediate results according to national stakeholders**



**Table 4-1 Extent to which the EY2012 achieved its expected immediate results according to national stakeholders**

Immediate result/level of achievement	Regional or local authority (or association thereof)	Employers' association	Trade union organisation	Civil society organisation (NGO)	Media organisation	EC representation	Quasi-State agency
<b>Policy makers of all levels, the civil society, social partners and the business community have been made aware of the importance of active ageing</b>							
To a very large extent	7%	22%	0%	13%	0%	0%	0%
To a large extent	36%	22%	17%	23%	50%	25%	0%
To some extent	29%	33%	67%	40%	17%	42%	50%
To a limited extent	29%	11%	17%	23%	17%	17%	33%
Not at all	0%	0%	0%	0%	17%	8%	17%
Cannot say	0%	11%	0%	0%	0%	8%	0%
<b>The issue of active ageing has being publicly debated</b>							
To a very large extent	14%	33%	0%	17%	0%	8%	0%
To a large extent	14%	11%	14%	23%	50%	25%	0%
To some extent	57%	22%	86%	23%	0%	42%	67%
To a limited extent	14%	22%	0%	27%	50%	0%	17%
Not at all	0%	0%	0%	10%	0%	17%	17%
Cannot say	0%	11%	0%	0%	0%	8%	0%
<b>Policy-makers and stakeholders have exchanged information on active ageing and learned from each other</b>							
To a very large extent	7%	33%	0%	17%	0%	0%	0%
To a large extent	21%	0%	0%	23%	33%	33%	0%
To some extent	36%	22%	100%	33%	17%	25%	67%
To a limited extent	29%	33%	0%	23%	33%	8%	33%
Not at all	7%	0%	0%	0%	0%	17%	0%
Cannot say	0%	11%	0%	3%	17%	17%	0%
<b>Policy-makers and stakeholders have had the opportunity to express their and to take concrete actions to promote active ageing</b>							
To a very large extent	8%	22%	0%	17%	0%	0%	0%
To a large extent	23%	11%	29%	17%	20%	8%	0%
To some extent	38%	44%	71%	38%	60%	58%	83%
To a limited extent	31%	22%	0%	24%	20%	8%	0%
Not at all	0%	0%	0%	3%	0%	8%	17%
Cannot say	0%	0%	0%	0%	0%	17%	0%

Source: National Stakeholders Survey

*The awareness of policy makers of all levels, civil society, social partners and the business community was raised*

There is agreement among EU level stakeholders consulted in the interviews that awareness raising was the best achieved outcome. Country stakeholders instead did not greatly differentiate among immediate results. It was a deliberate choice of the EC to focus awareness raising on stakeholders rather than the general public. 4,500 people participated in opening events.

Considering that normally representatives of organisations that participate in such events, the number of participants, about 150 per country on average, seems adequate to generate multiplier effects. Instead, for the activities more geared to the general public, 11,000 participants in the Senior Force Day and about 27,000 estimated pupils, teaching staff and older people involved in the Generations@school project<sup>43</sup> do not indicate a massive awareness raising effort; as it will be discussed in section 4.3, data on media activity do not indicate large impact on the public either. From the analysis of documents on key activities promoted at EU level (Awards, Senior Force Day, Generations@school) it appears that the main subjects of awareness raising were a comprehensive, holistic and positive concept of active ageing; and the importance of intergenerational solidarity.

#### *Debate was stimulated*

At EU level, debate was stimulated but some qualifications are needed. Among EU level stakeholders, there is agreement that debates were organised to share knowledge and information. However some representatives of EU level NGOs maintained that certain controversial issues (for instance, staying longer in employment<sup>44</sup>) could have been more thoroughly discussed in terms of comparing different opinions. It is also our assessment based on desk research that key events were more aimed at information sharing than debate in strict sense. At the EU Opening Conference, the stage was set for debate by presenting the perceptions and opinions of EU citizens on various aspects of active ageing. Yet interventions were focused more on solutions and good practices than controversial issues and dilemmas<sup>45</sup>. Also the closing conference highlighted achievements and presented scientific contributions as well as good practice examples, and emphasized the way forward, without delving too much on controversial issues.

At country level, debate was stimulated with the opening events and closing conferences. In a number of countries, additional dialogue initiatives were organised, for instance:

- In Bulgaria, next to the opening and closing events, 4 workshops were held on: Media and the Public Image of Elderly People; Active Ageing in the Labour Market; Active Ageing and Development of Social Security and Protection Systems – pension, health, long-term care; Active Social Ageing – solidarity between generations, development of voluntary work, different forms of self-organisation and good practices;
- In Spain, as an input for planning and implementation of activities, a White Paper was written<sup>46</sup>. This Paper contained an analysis of the main aspects that could have an impact on improvements of the quality of life of the elderly. International and national stakeholders provided input;
- A White Paper on active aging is also being prepared by the National Coordinator of the Year in Portugal, preceded by a series of regional workshops – to be delivered in 2014.

#### *Information was exchanged among policy-makers and stakeholders, and mutual learning was developed*

The information exchange outcome appears achieved, based on the evidence that follows. We have already presented the assessments of national stakeholders in Figure 4.4. showing that 51% considered the result achieved at least to some extent.

<sup>43</sup> Some 420 projects were delivered via the Generations@school initiative. The information available indicates that each project involved a minimum of one class (say an average of about 30 pupils), several teaching staff plus 10-15 older people. This assumption allows us to calculate the total minimum number of participants at about 18,900 (420 multiplied by 45).

<sup>44</sup> According to the Eurobarometer survey, 36% EU citizens totally disagree that the retirement age need to increase by 2030, and 24% disagree; 54% would not like to continue working after reaching the age of retirement.

<sup>45</sup> See documents from the Opening Conference: <http://eu2012.dk/de/NewsList/Januar/Uge-3/-/link.aspx?id=9FDA953E79AA44369A37438135AD74D4&z=z>.

<sup>46</sup> [http://www.imserso.es/imserso\\_01/envejecimiento\\_activo/libro\\_blanco/index.htm](http://www.imserso.es/imserso_01/envejecimiento_activo/libro_blanco/index.htm)

At EU level, there was a strong focus on good practice dissemination in the opening and closing events. Conferences for information exchange and mutual learning were organised by EU stakeholders; examples in point are the conferences organised by the 2012 Social Inclusion Regional Group (SIRG) under the theme Regions for Active Ageing and the mapping of good practices carried out by the European employer organisations BUSINESSEUROPE, CEEP and UEAPME, concluded by an EU-level conference in Brussels on Thursday 27 September 2012. Also the various awards allowed to publicise success stories and positive examples. In addition, the EU database of initiatives was a powerful instrument to share information on what was going on in the various countries, regions and localities.

A number of transnational and national projects promoted during the Year focused on mutual learning and the exchange of good practices, for example:

- The Active Seniors Learn, Educate, Communicate and Transmit – ASLECT Project was launched in six countries (Austria, Germany, Italy, Bulgaria, Romania and Turkey<sup>47</sup>). Good practices with respect to the involvement of the elderly in education and cultural life were documented and included into a document with recommendations for organisations working with the elderly;
- the @daptation project (Finland, Lithuania, Poland, Ireland) aimed at counteracting limited computer use among seniors by employing the resources of 55+ volunteers who facilitate older learners to gain basic ICT skills by using age-appropriate content and peer-learning approach, involved the sharing of training methods and practice in international workshops;
- In Bulgaria, four thematic workshops were organised on: Media and the Public Image of Elderly People; Active Ageing in the Labour Market; Active Ageing and Development of Social Security and Protection Systems – pension, health, long-term care; Active Social Ageing – solidarity between generations, development of voluntary work, different forms of self-organisation and good practices.

*A framework was offered to policy-makers and stakeholders to make public commitments and to take concrete action*

A framework for making public commitments was indeed offered to policy-makers and stakeholders in numerous initiatives – also this result is therefore achieved.

The opportunity to commit was taken at EU level with the Guiding Principles on Active Ageing, endorsed by the EU's Social Affairs Ministers on 6 December 2012. Moreover, EU stakeholders and social partners also took public positions and developed plans of action. For instance:

- The European Trade Union Confederation (ETUC), along with its pensioners' organisation, FERPA (*Fédération européenne pour les retraités et les personnes âgées*), adopted an Action Plan in December 2012, which sets out guidelines for all affiliated trade union organisations across Europe to contribute to the active ageing agenda;
- AGE Platform Europe produced a Joint Roadmap and Manifesto for an Age-Friendly European Union<sup>48</sup>: the Roadmap explains what the Coalition commits to do to support the objectives of the EY2012 and the Manifesto outlines what others may do to foster participation of older people and create an age friendly environment across the European Union.

At country level (national, regional or local) a number of countries launched policy programmes using the occasion of the Year:

<sup>47</sup> <http://www.aslect.eu/index.php/en/about-us/about-project>

<sup>48</sup> [http://www.age-platform.eu/images/stories/23598\\_poster\\_everyone2012\\_v4.pdf](http://www.age-platform.eu/images/stories/23598_poster_everyone2012_v4.pdf); [http://www.age-platform.eu/images/stories/EN/EY2012\\_Coalition\\_Roadmap.pdf](http://www.age-platform.eu/images/stories/EN/EY2012_Coalition_Roadmap.pdf)



- Austria launched a Federal Plan for Senior Citizens in January 2012;
- Belgium established in November 2012 a new Federal Advisory Council for the Elderly;
- Ireland decided that every local authority area in Ireland will have its own Age-Friendly County Programme by the end of 2013;
- Poland adopted in August 2012 a Government Programme for Senior Citizens Social Activity for the years 2012-2013<sup>49</sup>.

Closing events were celebrated in most countries (at least 23, according to our survey), in many cases ending with proposals for further action. For example:

- in Romania a commitment was made by the government to elaborate a national strategy on active ageing;
- In Italy a National Award for Active Ageing and Intergenerational solidarity was the occasion for regional and local authorities as well as civil society organisations to get engaged in concrete actions<sup>50</sup>.

Civil society was often at the forefront in making commitments, for instance in Poland a Pact for Senior Citizens was signed at the first congress of Third Age Universities<sup>51</sup>.

The initial idea was to use the EU database as a tool to display and monitor commitments made in participating countries towards active ageing. The information contained in the final database however only partially reflects the major commitments made in Member States during the Year and is more focused on events and initiatives. Progresses on policy outputs were shared at National Coordinators' meetings. It could be that Member States preferred to share these policy updates at their own pace and did not want to expose themselves to systematic EU level monitoring in an area where they retain key competences, outside of the regular institutional EU processes – this was however not discussed by them in their questionnaire responses.

An instrument to formalise commitments at local level that was proposed during the Year is the Covenant of Mayors on Demographic change. This Covenant was proposed by Age Platform, gained support by the Committee of Regions, and was included in the frame of the European Innovation Partnership on Active and Healthy Ageing (EIP on AHA) Action Group on 'Innovation for age-friendly, buildings cities and environments'. The stakeholders committed to this Action Group will build and run a campaign to gather political support for an EU covenant on demographic change. The Commission is supporting their work and looks forward to the outcomes<sup>52</sup>. The Covenant is an example of the length of the process required to arrive to a formal commitment involving local stakeholders in all Member States – the positive outcome would not have been possible in the time frame of the Year.

## 4.2 The achievement of higher level results

Based on the information collected in the evaluation, we conclude that the Year achieved the results of strengthening the existing networks, creating synergies and partnerships between government levels and policy areas, promoting policies and long term strategies and making

<sup>49</sup> <http://www.mpips.gov.pl/aktualnosci-wszystkie/seniorzy/art,5859,konsultacje-projektu-rzadowego-programu-na-rzecz-aktywnosci-spoecznej-osob-starszych-na-lata-2012-2013.html>

<sup>50</sup> A list of the initiatives to which a contribution was awarded is here:  
<http://www.politichefamiglia.it/media/84954/progettupremiatiannoeuropeo2012.pdf>

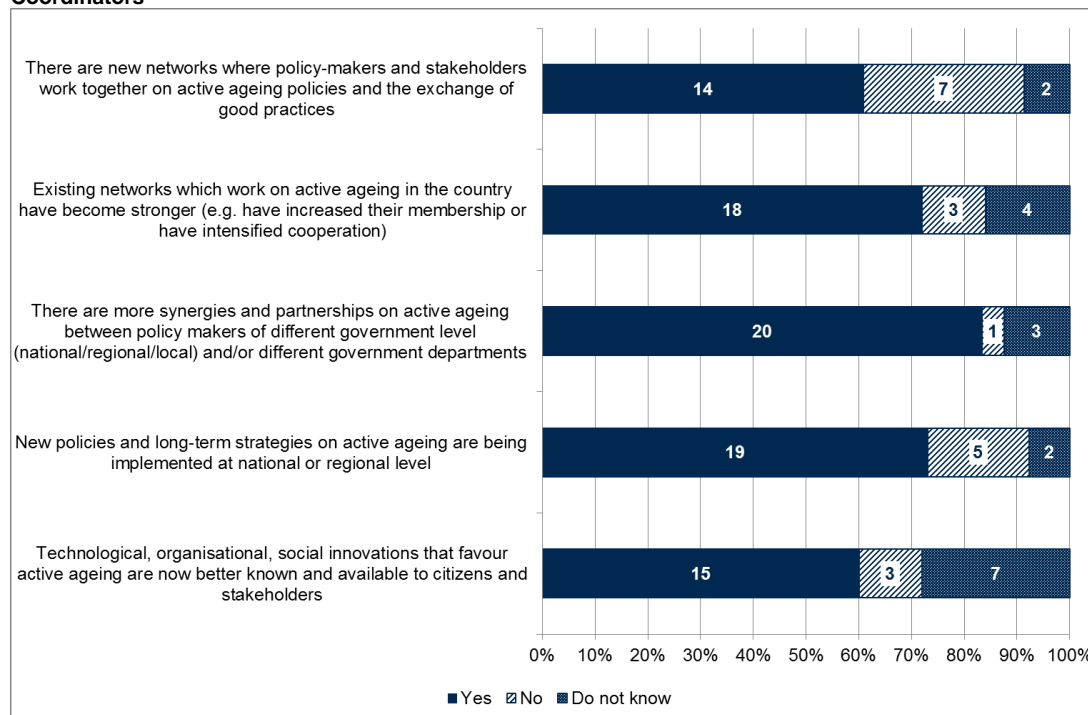
<sup>51</sup> Source? National coordinators Survey.

<sup>52</sup> Answer given by Mr Andor on behalf of the Commission to Parliamentary questions on 14 May 2013.

available technological, organisational and social innovations. The result of establishing new networks was achieved to a lesser extent.

The attainment of the intermediate results of the Year according to the perceptions of National Coordinators is illustrated in Figure 4.5.

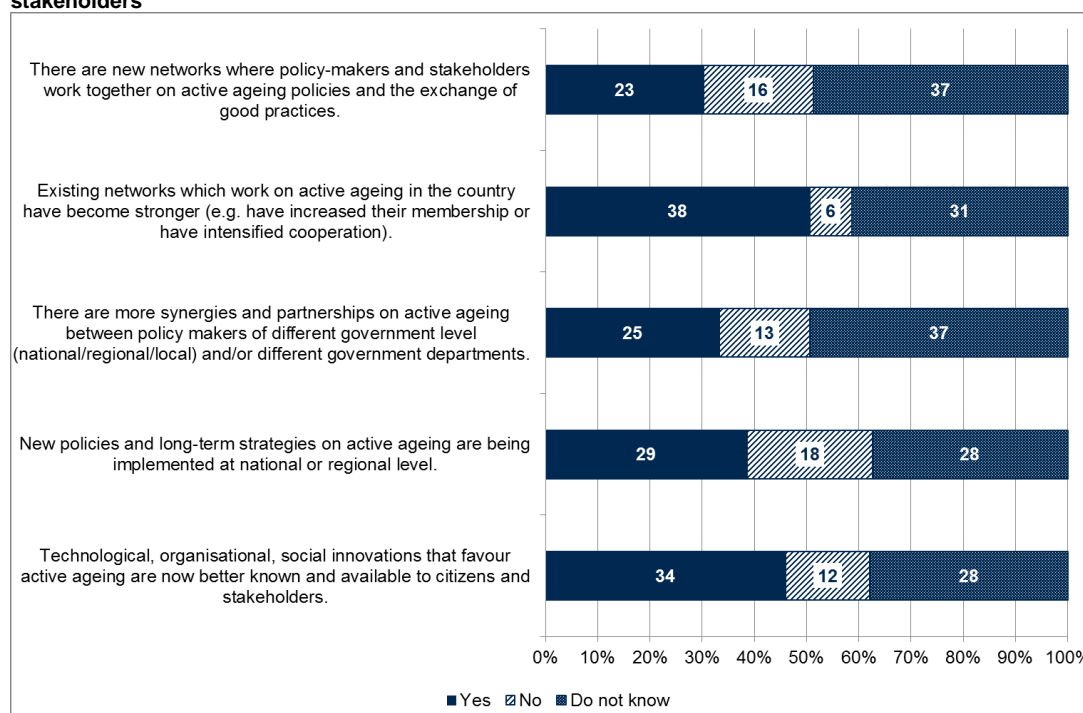
**Figure 4.5 Achievement of expected intermediate results in the country according to National Coordinators**



Survey: National Coordinators Survey.

Also national stakeholders were consulted about the achievement of intermediate results. A large share of stakeholders did not pronounce themselves, but among those who did, positive opinions were more frequent than negative opinions. The result that was most widely confirmed is the strengthening of existing networks (confirmed by 51% of respondents), followed by the better knowledge and availability to citizens and stakeholders of technological, organisational and social innovations (see Figure 4.6 below).

**Figure 4.6 Achievement of expected intermediate results in the country according to national stakeholders**



Survey: National Stakeholder Survey.

We now discuss the expected intermediate results one by one.

### New networks established

About two thirds of National Coordinators flag that there are new networks working together on active ageing in their countries as a result of the EY2012. The new networks in strict sense appear however less widespread to a closer scrutiny of their open answers. Sometimes they refer to entities that are not properly networks, for instance a Committee on Active Ageing in Malta. In France the respondent makes vague reference to the fact that the EY2012 enabled authorities to identify and summon local actors from the whole country and continue to work in partnership with them after the Year. Other times the examples do indeed point to networks. Greece mentioned a new European network under the European project FORAGE (For later life learning) with the University of Leicester as the European coordinator. In Luxembourg, a network for the prevention of accidents among senior people was established.

At the EU level, the new networks which are most often cited by interviewees are the Stakeholders' Coalition itself, the European and Innovation Partnership on Active and Healthy Ageing, and the ongoing building up of an official EU network on the Covenant on Demographic Change. Some interviewees stressed though the temporary nature of the Stakeholders Coalition. While in other years the networks had more potential to become permanent, this Year the theme was very broad. This enabled a range of different stakeholders to participate, but some of them which do not have a clear mandate on ageing went back to their business after the Year finished<sup>53</sup>. The contacts made remain of course as an asset. As one EU network representative put it, "The Year created new forms of working together with partners we would never cooperate with otherwise; maybe we will not see them again, but we can go back to them"<sup>54</sup>.

<sup>53</sup> Interviews with EWL, Eurodiaconia.

<sup>54</sup> Interview with EWL.

At the end of 2013, the main forum where AGE Platform is continuing its networking activity appears to be the EIP-AHA. There, only a few of the EU organisations that were members of the Stakeholders' Coalition appear active, with a prevalence of research institutions and regional and local authorities<sup>55</sup>.

### Existing networks strengthened

Conversely, already existing networks were strengthened by the Year. This opinion is shared by above two thirds of the National Coordinators. Also a majority of national stakeholders subscribed this view.

Although budgets for projects were not available at national level, having a theme to work on together represented an opportunity for strengthening ties among different actors in several countries.

Sometimes these networks were national policy fora: in Estonia, the Committee for Ageing Policy has new members and is more active, while in Bulgaria, the government working group on demographic issues has been enlarged.

Other times, the EY2012 reinforced networks of organisations which are active in culture and services: in Slovenia, for example the number of stakeholders and exhibitors at the Festival for the third Age increased and in Lithuania, there was an increased cooperation between main NGOs of the elderly and the Third age universities.

In the case of Portugal, the strengthened network was the very local social support network for the elderly. The Year mobilised the local networks of local government departments for social security, private welfare institutions, health services, voluntary organisations, police posts that work in coordination in the context of the Programa Rede Social. According to the National Coordinator, the mobilisation was quick and easy because these networks were already structured. Another example is the network of elderly women in Grubbnäsudden, an isolated part of northern Sweden.

The strengthening of existing networks also emerges from the desk research and interviews as an EU level achievement. First of all, the AGE Platform, a European network of around 165 organisations of and for people aged 50+ representing directly over 30 million older people and set up in January 2001, played a clearly recognised leadership role in the Year that strengthened its visibility and prestige. Also more specialised networks like SIRG gained strength from the Year by organising activities.

### Synergies and partnerships between government levels/policy areas

The Year appears to have been successful in increasing synergies and partnerships.

Stronger cooperation links on active ageing between policy makers of different government level (national/regional/local) and/or different government departments are reported by four fifths of National Coordinators and confirmed by about one third of national stakeholders (and in particular by 29% of regional and local authorities),

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<sup>55</sup> For instance, this appears when browsing the list of delegates at the Conference of Partners of the European Innovation Partnership on Active and Healthy Ageing - See more at: <http://www.age-platform.eu/component/jevents/icalrepeat.detail/2013/11/25/57/-/conference-of-partners-of-the-european-innovation-partnership-on-active-and-healthy-ageing#sthash.xCjRQMSV.dpuf><http://www.age-platform.eu/component/jevents/icalrepeat.detail/2013/11/25/57/-/conference-of-partners-of-the-european-innovation-partnership-on-active-and-healthy-ageing#sthash.xCjRQMSV.dpuf>.

Regarding cooperation between policy areas, about two third of countries (16 of 26 responding) included in the organisation of the Year different ministries, typically at least the ministry of employment/social affairs and the ministry of health; often also the ministries of education, culture, youth, sport; occasionally other ministries, like the ministry of transport (Czech Republic) or the ministry of interior (Portugal). Some of these partnerships are continuing. In Portugal, for instance, the Ministry of Solidarity and Social Security and the Ministry of Interior signed a cooperation protocol to combat isolation and loneliness of elderly people<sup>56</sup>. In Luxembourg, the cooperation between ministries is continuing beyond 2012 for activities of common interest.

Partnerships between different levels of governance were also established during the Year. For instance, in Belgium the Year was organised at the federal level and provided an occasion for exchange and cooperation between Regions and Communities. In Portugal, the central government mobilised the 193 Local Councils for Social Action (CLAS) and the 25 Supra-council Platforms which developed local plans in coordination with the local government and other institutions; currently, the regional and local authorities are involved in the production of a White Paper on Active Ageing that will be the basis for a national strategy.

At EU level, partnerships were established across different DGs. In terms of the preparations for the Year there was a Commission Inter-service Group including DG EMPL, DG SANCO, DG JUST, DG RTD. Cooperation was particularly intense between DG EMPL and DG SANCO. Follow-up in policy terms included developing strategies on active and healthy ageing and SANCO continues to work with DG EMPL on that. DG EMPL recently issued a call for proposals and DG SANCO participated in the evaluation of the applications. DG SANCO's is also working on their own initiative with DG CONNECT and DG EMPL on different events, as well as with the WHO.

Several EU stakeholders mentioned that their member organisations teamed up for submitting project proposals on active ageing, as a result of the Year. Some developed policy cooperation afterwards, e.g. AGE helped COFACE to lobby for designating 2013 the EY of reconciliation of work and family life.

### Innovative solutions, policies and long-term strategies promoted

The existence of innovative solutions, policies and long-term strategies for active ageing is a legacy of the Year in the majority of countries, according to National Coordinators (and confirmed by almost 40% of national stakeholders – especially employers' associations and media organisations, with two thirds of affirmative responses).

Regarding **policy outputs**, some of them were planned before the Year, but as a minimum the Year served for submitting them to public debate.

**Table 4-2 Policy outputs in participating countries**

Country	
Austria	Federal Plan for Seniors, National Strategy on Lifelong Learning, work and health, Fit2work project, Project, Invalidität im Wandel (changing disability) 2.
Germany	The new concepts were implemented through projects funded by the Federal Ministry for Family, Seniors, Women and Youth, and through projects, actions and measures supported by other agencies.
Portugal	Establishment of Senior Councils for self-representation and participation in local and national policy-making.
Lithuania	A new Employment strategy is in preparation, for which the main principles of active

<sup>56</sup> [http://www.dn.pt/inicio/portugal/interior.aspx?content\\_id=3028611](http://www.dn.pt/inicio/portugal/interior.aspx?content_id=3028611)

Country	
	ageing are used extensively.
Estonia	Strategy for active ageing 2013-2020.
Slovakia	National Program for active ageing 2014-2020.
Czech Republic	National Action Plan on Ageing 2013-2017.
Belgium	Federal advisory council for the elderly and regional integrated strategies for elderly policy.
Poland	Long term senior policy in Poland 2014-2020 (in progress).
Romania	A National Interest Program addressed to the establishment of new residential centres for elderly persons, financed by the Ministry of Labour is implemented till the end of 2013; a national Strategy on active ageing will be drafted in 2013.
Slovenia	New pension legislation and new Labour market legislation.
Malta	An active ageing strategy is being drafted.
Bulgaria	National concept for active ageing.
Latvia	Concept paper on 50+ employment facilitation.
Sweden	The new inquiry on retirement age (final report April 2013) commissioned by the National Government suggests e.g. new strategies to prevent early retirement.
Spain	Senior people's Charter drafted in the framework of the State Senior Council.
France	Law project on independent living.

Source: National Coordinators Survey.

The table above shows that in certain countries (especially New Member States) comprehensive strategies and plans were adopted, while in other ones the outputs were more at the level of concept papers, charters, pieces of legislation covering specific issues, or projects. The case study of Poland provides an example of how the development of policy initiatives – government programme for participation of senior citizens, pension reform – was significantly affected by the EY2012 and the mobilisation of actors is sustaining the success of such initiatives.

At the EU level, the main policy output of the Year are the Guiding Principles for Active Ageing and Solidarity between Generations. These principles, which are annexed to the Council declaration on the European Year 2012 (17468/12), are not prescriptive; it will be for national governments, regions, cities, companies, trade unions, civil society organisations and others to make use of them according to their specific situation and challenges. It would have been difficult to produce a more binding document on the broad range of topics covered by the active ageing concept, most of which fall in areas of competence of Member States. The success of these principles will need to be measured over time in terms of their concretisation in national and local policies.

For what concerns **innovations**, a few countries mentioned technological solutions (e.g. aids for independent living – Malta – or systems for the monitoring of the elderly at home – Portugal, Romania). Information concerns mainly the fact that such innovations were publicised and showcased, often at conferences, fairs and other special events, and their adoption was expanded (e.g. Portugal).

In other countries (e.g. Slovakia) the focus was on organisational innovation - the process of deinstitutionalisation of social services and the establishment of alternative care, or the development of public-private partnerships in the delivery of services (Bulgaria).

It is also important to stress the link between the increasing presence of active senior citizens and the search for innovation in service provision. In Portugal, for example, the Year was the occasion for supporting a paradigm shift in the delivery of day care services from centres where passive

elderly people spend their time playing bowls, sitting or chatting, to places where a new generation of active senior citizens engages in lifelong learning, volunteering, and other meaningful activities. The Universities of the Third Age were key actors in representing this new paradigm in several countries.

At EU level the issue of technological innovation for active ageing continues to be taken forward by the EIP-AHA. It is also the subject of several activities of DG CONNECT, although these were designed prior to the Year and independently from it (the theme has been an integral part of DG CONNECT activities for at least eight years).

On social and organisational innovation, DG EMPL continues to support innovative approaches. In the Roadmap for the application of the Social Investment Package there is mention of further development of the Active Ageing Index and a joint initiative with WHO to adapt the WHO global guide on age-friendly cities to the EU context and establish an EU network of age-friendly cities. Other relevant initiatives are a methodology to calculate the gender pension gap and a number of initiatives on long-term care services<sup>57</sup>.

### 4.3 The attainment of target groups

The Year targeted the following types of actors:

- national governments;
- regional and local authorities;
- social partners at EU, national level;
- civil society organisations at EU, national, regional and local level;
- the business community, including small and medium-sized enterprises, at EU, national, regional and local level;
- the general public and the media at EU, national, regional /local level.

In terms of outreach to these different target groups, the main achievement appears to be the mobilisation of civil society organisations. The involvement of regional and local governments was also significant, but did not happen to the same extent in all countries; the dynamism and visibility of National Coordinators to local governments may have made the difference. The involvement of social partners was variable - as it is the landscape of social partner organisations and the tradition of industrial relations in Member States. Private businesses were not considered well reached by the majority of National Coordinators, however they appear as promoters of a good share of initiatives included in the database. Private companies participated in fairs and showcasing events, but were less easy to involve in policy initiatives. When they were involved in The Year, private businesses played a role as providers of services and products, and in some cases also as providers of volunteers. Regarding the outreach to the general public via the media, the picture is mixed, with countries equally divided between those that claim to have succeeded to a large or very large extent, and those that consider success partial or limited. The engagement of the public at EU level with social media and the website was also somehow limited. This result echoes previous Years, including those in which a consistent budget was spent on an EU communication campaign (see in the chapter of efficiency and delivery mechanisms page 85). In the following paragraphs we provide some evidence of the attainment of target groups from our sources.

The organisation of the Year at country level paid due attention to the mobilisation of different types of actors. A large majority of countries (21) built national stakeholders coalitions or committees to

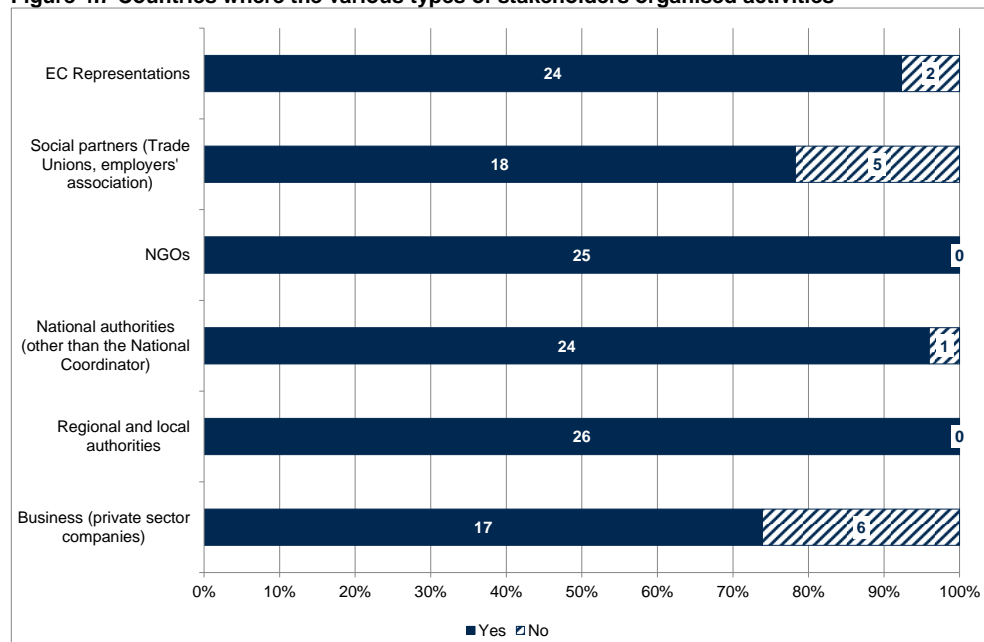
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<sup>57</sup> <http://ec.europa.eu/social/BlobServlet?docId=11150&langId=en>.



plan and monitor the Year. NGOs, National authorities, local and regional authorities and EC representations were involved in the organisation of activities in almost all countries; social partners and the business sector were so in a large majority of countries (AT, BE, BG, CZ, DE, EE, ES, FI, LT, LU, LV, MT, PL, PT, SI, SK, UK). Figure 4.7 below provides the number of countries in which each type of stakeholder was involved, as reported by National Coordinators.

**Figure 4.7 Countries where the various types of stakeholders organised activities**



Source: National Coordinators Survey.

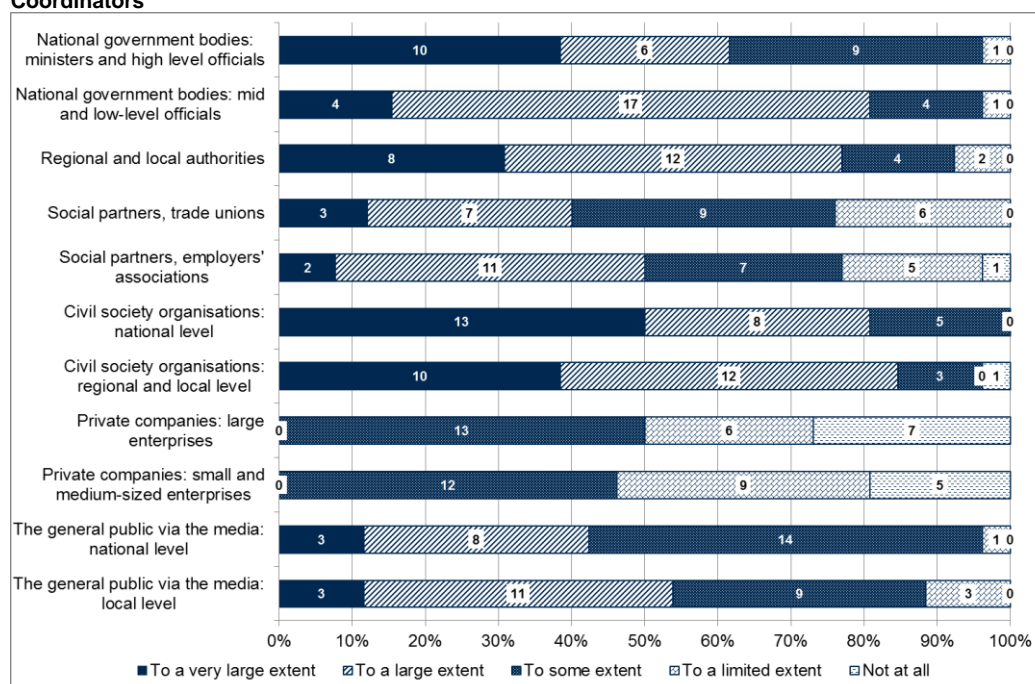
Although all types of stakeholders organised activities, the corresponding target groups were not all equally reached.

In most countries National Coordinators report that they reached civil society organisations at national and local level, and most often also national government bodies (especially at the level of mid- and low-level officials) as well as regional and local authorities. The perception of having reached social partners is more variable, and the same applies to the involvement of the public through the media. Limited success in outreach to the public was by one National Coordinator attributed to lack of funding for a sustained communication campaign but this might have been the case for other countries too (the issue was also raised in some EU level interviews). It is, however, a logical consequence of prioritising stakeholders. Private businesses (both large and small-medium sized enterprises) are almost everywhere considered to have been reached only to some extent or to a limited extent.



**Figure 4.8 Extent to which target groups were reached in the country according to National**

**Coordinators**



Source: National Coordinators Survey.

In the following table, we provide the detail of the countries where each target group was reached "to a very large extent" or "to a large extent".

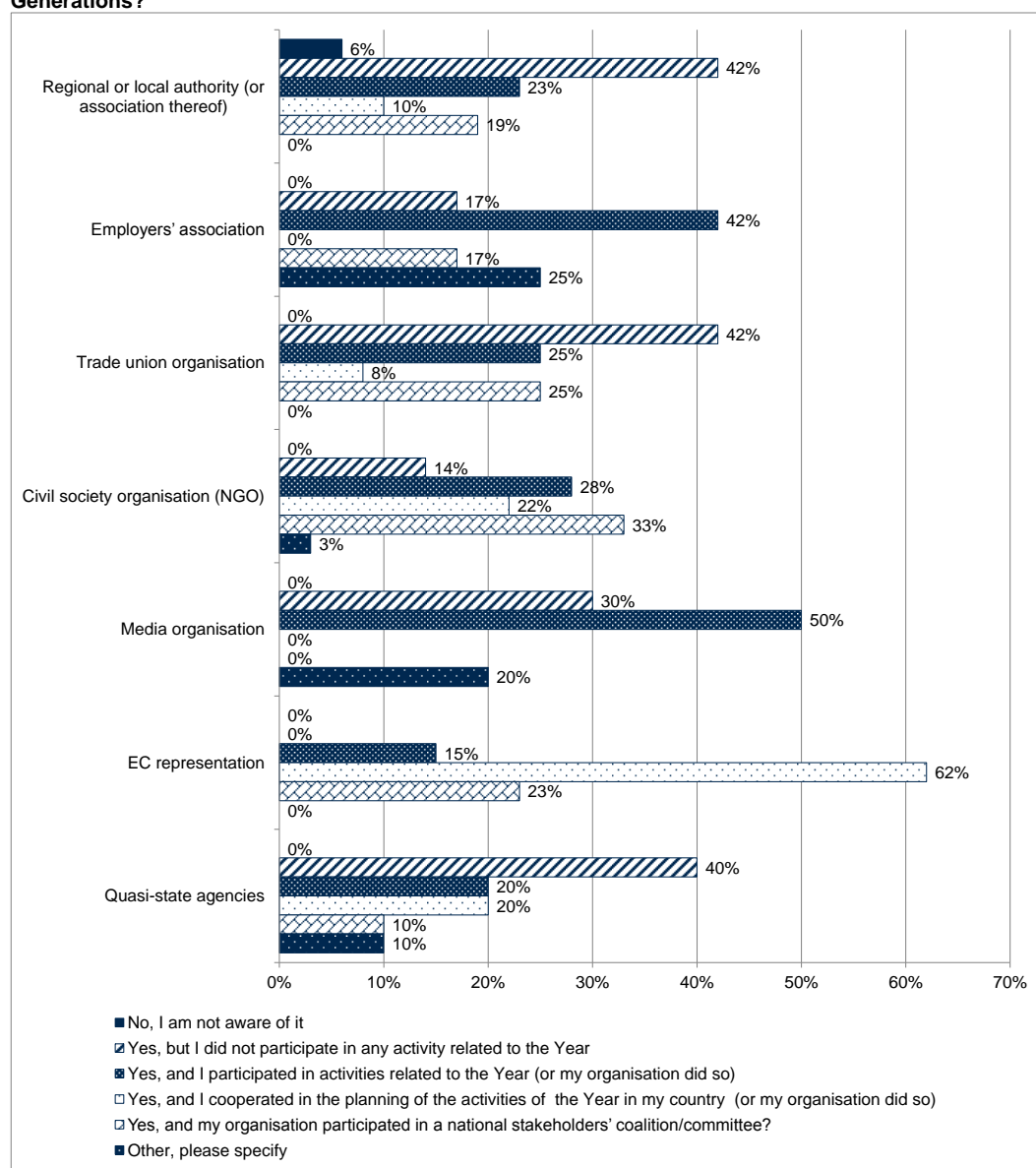
**Table 4-3 Countries where target groups were reached to a large or very large extent according to National Coordinators**

Target group	To a large extent	To a very large extent
National government bodies – ministers and high level officials	BG, EE, LU, HU, PL, SE	BE, DE, ES, IT, CY, LT, NL, AT, SI, SK
National government bodies – mid and low-level officials	BG, CZ, DK, DE, EL, ES, FR, IT, LV, LU, HU, AT, PL, RO, SI, SK, SE	BE, CY, LT, NL
Regional and local authorities	BE, BG, EL, FR, LV, LU, HU, NL, RO, SK, SE, UK	CZ, DE, EE, IT, CY, AT, PL, PT
Social partners, trade unions	BE, BG, DE, LV, MT, NL, UK	EE, CY, AT
Social partners, employers' associations	BE, BG, DE, EE, ES, LV, LU, MT, NL, FI, UK	CY, AT
Civil society organisations – national level	BE, BG, HU, MT, NL, RO, FI, UK	DE, EE, ES, IT, CY, LV, LT, LU, AT, PL, PT, SI, SK
Civil society organisations – regional and local level	BG, CZ, DE, EE, EL, HU, MT, NL, RO, SI, FI, UK	ES, IT, CY, LV, LT, LU, AT, PL, PT, SE
Private companies – large enterprises	-	-
Private companies - small and medium-sized enterprises	-	-
The general public via the media – national level	EE, CY, LV, LT, MT, AT, PL, SK	BG, DE, LU
The general public via the media – local level	CZ, DE, EE, EL, ES, CY, HU, MT, AT, SK, SE	BG, LU, PL

Source: National Coordinators Survey.

We can triangulate the claims of National Coordinators with the responses of our sample of stakeholders regarding their involvement in the Year (Figure 3.7 below) - the categories are in fact in large part overlapping.

**Figure 4.9 Are you aware that 2012 was the European Year for Active Ageing and Solidarity between Generations?**



Source: National Stakeholders Survey.

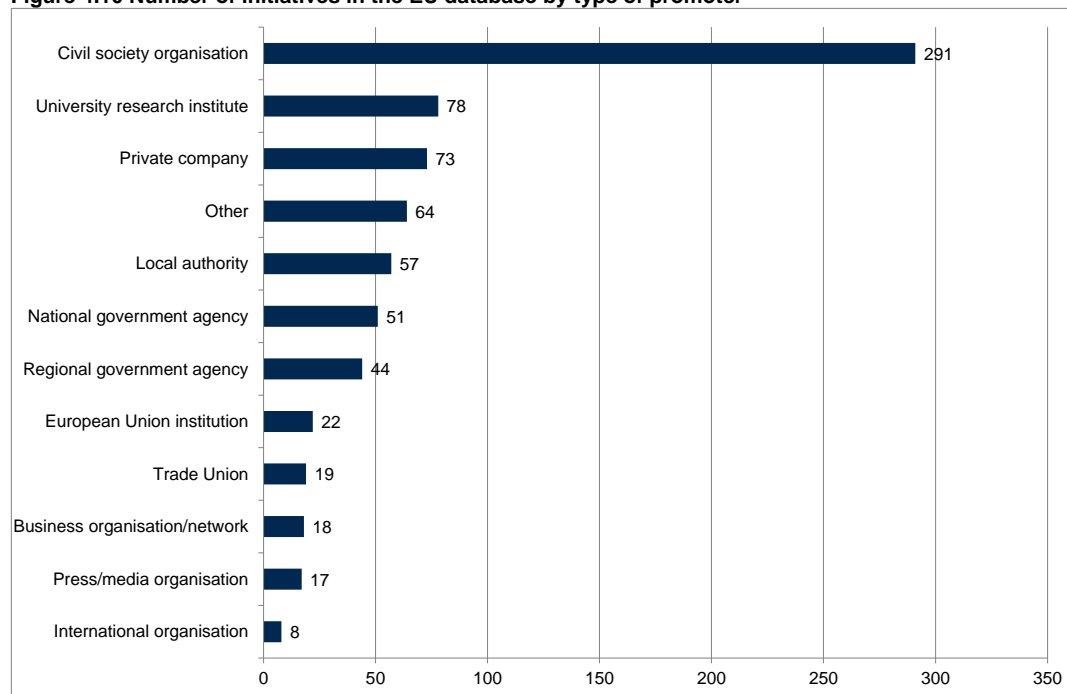
The numbers for each category are low, thus the following observations have to be taken with caution. Apart from EC representations that have an institutional role in the Year, civil society organisations were most often involved in the Stakeholders' Coalition or cooperated in the planning of activities of the Year. Social partners, trade unions and employer organisations participated in activities of the Year in over one half of cases, but trade unions more often also joined the planning and coordination. For instance in Bulgaria the trade union organization CITUB participated in the national planning and in all key activities - conferences, seminars; in Cyprus the pensioners' union PA.SY.D.Y. participated in the preparing and in the execution of various activities of the National Programme; in Ireland trade unions were part of the organising committee. Regional and local authorities cooperated in one fourth of cases and participated in another fourth of cases, but did not take part in the Year in almost one half of cases (and in a couple of cases located in Germany they

were unaware of it); a similar pattern was found among quasi-state agencies. Media organisations were mostly aware of the Year (they were taken from a list of the media contractor, thus this is not a surprise) but were never part of the coordination or planning, while EC representations were almost always involved in it.

Thus, the consultation of our sample of stakeholders does not confirm the large success in involving local and regional authorities claimed by national coordinators. It can be also noted that the only few cases of unaware organisations were found among regional and local authorities. This matches what was told to us by the interviewees from the local authorities association, i.e. that in some cases local authorities could have been better reached. This would have depended on the different level of visibility of the National Coordinator and how much he/she was known. A positive example of involvement of local authorities is represented by Portugal, where the National Coordinator travelled across the country extensively to mobilise municipality and local social networks.

Finally, if we consider another indicator, the number of activities promoted by each type of stakeholder among those included in the EU database of initiatives, we see a prevalence of initiatives by civil society organisations. We also note a strong role of private companies despite the perception of the National Coordinators of not having attained this target group very effectively (Figure 4.8 above). . As the database also lists activities that were organised independently from the Year, this means that the business community was loosely involved as a player in the active ageing field, but not strongly associated in the organisation of the Year. We also note a strong presence of research institutes and, to a lesser extent, local, regional and national government authorities. The role of social partner organisations is more limited. A wide number of organisations were classified by the EY2012 team under “other” and include such diverse entities as vocational training centres, private social security institutions, or individuals.

**Figure 4.10 Number of initiatives in the EU database by type of promoter**



Source: Ecorys calculations on EU database.

## 4.4 Main impacts of the EY2012

Based on the evidence presented so far and response to further specific questions by National Coordinators and Stakeholders, we can conclude that the most important impact of the Year was, as stated as main objective, the mobilisation of actors. This could be achieved by developing partnerships and strengthening existing networks; primarily civil society actors like associations and NGOs were mobilised but also, to a variable extent according to countries, local and regional authorities (especially in CZ, DE, EE, IT, CY, AT, PL, PT), social partners (especially in AT, CY, EE), the general public through the media (especially in BG, DE, LU, PL) and, to a generally limited extent, the business community. The Year also contributed to the insertion of the theme of active ageing in the policy agenda, in some countries playing a more decisive role, in other countries supporting a trend that was already there. Moreover, a large number of countries also achieved concrete policy results, in terms of establishment of strategies, plans and bodies in charge of implementing active ageing policies. No other unexpected or unrelated impacts were detected.

## 4.5 Obstacles, facilitating factors and lessons learnt

At country level, neither the National Coordinators nor the stakeholders reported to have encountered insurmountable obstacles in the implementation of the Year although of course the level of activity depended on budget availability. A number of factors emerge as having played a role in determining the success in involving the target groups and achieving the expected results:

- The broad nature of the theme chosen for the Year was a facilitating factor for involving a broad range of stakeholders, but represented a challenge in keeping these together once the Year is finished;
- The time frame limited to one year potentially set an obstacle to the implementation of activities in the countries. The thematic continuity with prior Years (EY2010 for combating poverty and social exclusion; EY2011 for volunteering) was a facilitating mitigation factor, as both National Coordinators and stakeholders could build on experiences;
- The pivotal role of EU civil society organisations, starting from the role of the AGE platform in the stakeholders coalition, was a success factor in reaching out to civil society groups in all countries: there was continuity between the presence of NGO networks in the stakeholders coalition and the mobilisation of their country members;
- The more dispersed nature of social partners across a number of sectors organisations is perhaps the reason why their already not exceptional involvement in EU activities became even less visible in countries;
- As far as regional and local authorities were concerned, the absence of top-down transmission mechanisms between EU official representative organisations and regional and local authorities resulted in patchy mobilisation. Conversely, the existence of thematic voluntary groupings of regional and local authorities resulted effective, as it was the mobilisation by National Coordinators;
- The lack of a country budget was in some countries an obstacle to reaching the wider public because it weakened the communication campaign; to some extent, also to more intensively involve NGOs as there were no resources to organise pilot projects on the ground. This subject will be discussed more extensively in the chapter dedicated to efficiency;
- Finally, the personal leadership qualities of National Coordinators, their networks of contacts in different national institutions and their dynamism in travelling around the country to spread the message appear to have been a key success factor in the delivery of the Year, at least in certain countries. Given that the focus was on institutional stakeholders rather than the larger public, the importance of ambassadors appointed among celebrities seems to have been more limited.

## 4.6 The contribution of major EU events and initiatives

### 4.6.1 Key EU events

Overall, the various EU Level events made strong contributions to the EY2012. Those that appeared most relevant and successful based on our survey and interviews, were the opening event in Copenhagen, the Generations@school initiative and the Awards, although with hindsight the latter should have concentrated on fewer themes. Seniorforce Day did not realise its full potential, as a result of contractual delays and difficulties in developing a common format, and had to revert to a series of smaller, national events, which lessened the impact. The journalists conference was also affected by implementation difficulties, but although organised at short notice nevertheless had an impact.

**High level conference 'Towards the European Year for Active Ageing and Solidarity between Generations (2012)**, held in April 2011<sup>58</sup>. Serving as a 'pre-opening' conference, this event was part of a strategy to mobilise relevant actors well in advance. The EY2012 website was launched at the conference. The conference was also used to mark the 3rd European Day on Solidarity between Generations. Speakers included the Commissioner (László Andor) and Nellie Kroes, Vice-President of the European Commission in charge of the Digital Agenda. Themes addressed included older workers in the labour market, intergenerational engagement and sessions on *"Getting ready for the European Year 2012" - Recommendations from the Coalition of EU NGO networks*, and *"Mobilising stakeholders for the European Year 2012" – strategies and plans of EU stakeholders and international organisations*.

The survey of NCs suggests that the **EU Opening Conference in Copenhagen** (18/19 January 2012) made a strong contribution to the Year (70% of respondents found it to be relevant or very relevant in terms of format and content). The evidence from consultations supports this generally positive finding: in particular the participation of high-level politicians and providing a platform to older people themselves as active participants in the proceedings were welcomed. The event benefitted from having a full-time moderator (journalist), covered a diverse range of topic areas and was also web-streamed.

The aim of the **Journalist's Conference** (19/20 March 2012) was to attract more attention to the Year from journalists and hence generate more publicity. Over 80 participants attended this event. No specific messages were developed to be disseminated, but the focus was on stressing opportunities rather than the problems of ageing. PAU performed a feedback exercise, which reported generally positive results. The conference included interactive sessions, Q&A sessions with the Commissioner and academics lectures. The subjects dealt with included demographics and active ageing policies. The Journalists Conference was organised by an external service provider (ICWE), which also selected participants/speakers and implemented all of the logistics aspects. According to ICWE the event went well – the outcome was considered as positive (although because of delays it all had to be organised in only three weeks). The original date was cancelled and in the end participants had to be invited at very short notice. Despite this, there were 82 participants including 41 journalists from 22 countries and 12 journalism students. There were 11 speakers, 16 from the EC (including the Commissioner) one from Eurofound and one from UNICRI. The organiser reported a positive response to the one-and-a-half day event from journalists and students.

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<sup>58</sup> <http://ec.europa.eu/social/main.jsp?catId=88&langId=en&eventsId=335&furtherEvents=yes>.

The original concept for the **Generations@school** initiative was inspired by a similar project in Northern Ireland and was identified by DG EMPL as an effective way to reach out to schools and particularly to foster engagement with the Year at local level. It also helped to boost the intergenerational component of the EY2012, and to attract media attention. The initiative was operated by the EY2012 media contractor, which provided a dedicated website, guidance material, resources and support. The initiative attracted an estimated 600 schools, 420 of which carried out activities and other 175 showed interest for future projects; although some countries had a higher level of participation than others (in particular Romania, Bulgaria, Poland and Spain). The information available indicates that each project involved a minimum of one class (say an average of about 30 pupils), several teaching staff plus 10-15 older people. This assumption allows us to calculate the total minimum number of participants at about 18,900 (420 multiplied by 45). Participation in the initiative undoubtedly held widespread appeal for many schools – in most of the examples researched<sup>59</sup>, activity was implemented in 2012 and again in 2013. For the most part schools were already interested or involved in inter-generational activities and awareness of the European Year itself appears limited. However the opportunity, practical tools and guidance and publicity (in particular the opportunity to enter a competition) is likely to have boosted interest and prompted action where this would otherwise have been slower or lower in terms of public profile. It might also be argued that the Year made it more likely that follow-on projects post-2012 would be considered by schools. The evidence supports the suggestion that the take-up of Generations@school activities during (and importantly after) the EY2012 reflects the essential bottom-up nature of the initiative, the ease with which schools can engage with it and the comparatively low cost.

The **Conference on "Good Governance for Active and Healthy Ageing" (4 June 2012)**<sup>60</sup> examined how different levels of government can cooperate in designing effective and comprehensive strategies for active and healthy ageing. It also highlighted the role the EU can play as *"...a facilitator for mutual learning on how we can develop effective strategies for active ageing"* More than 160 representatives from national governments, regional and local authorities, social partners and other relevant stakeholders took part. The closing speech was delivered by the Director General of DG SANCO who advocated a "cross-cutting" strategy with the different types of stakeholders concerned.

**Seniorforce Day** attracted some 11,000 participants through the 25 events held in Member States in September and October, 2012 to honour senior volunteers, thus an average of 440 participants per event. The original intention had been to link the Seniorforce Day to the EY2012 Awards, but because of delays in contracting with PAU, the event could not be organised at EU level within the planned timetable. It was therefore decided to opt for one key event per Member State. Although there were 11,000 participants across the various national events<sup>61</sup>, the lack of the incentive that a link to the Awards would have provided, and a common format that was considered less well developed meant the initiative was less successful than originally hoped (compared with the Generations@school format for example, but also because of differences between Member States, and some already having organised events such as volunteering fairs).

The aim of the **European Award Scheme** was to mobilise actors across Europe and to attract media attention to the EY2012. This was an ambitious undertaking since there were seven categories and proposals could be prepared in the national languages. Because of the latter dimension, there was on-line voting at national level, but for the EU jury and the ceremony the

<sup>59</sup> See full Generations@school Case Study in Annex I.

<sup>60</sup> <http://europa.eu/ey2012/ey2012main.jsp?langId=en&catId=970&newsId=1634&furtherNews=yes>

<sup>61</sup> Including for example an event in Vienna that attracted 2,000 people.



submissions had to be translated. 1,386 submissions were recorded. For all categories except Generations@school if we assume an average 'team' of five people, that gives us 5,125 participants. Generations@school had 361 submissions, which, using the same assumptions as above gives 16,245 participants, or a total of 21,370. In terms of countries, submissions from Germany were most numerous (173), followed by Spain (122), Portugal (110) and Austria (93 and Poland (93). In terms of themes, Generations@school attracted the greatest number of applications (361 or 26% of the total), followed by the journalist award (308 or 23% of the total); and social entrepreneurship/towards an age-friendly environment (each representing around 17% of the total). The themes that attracted relatively less interest included social entrepreneurship and life-story challenges (23 and 76 entries, respectively). The quality of the activity reportedly varied per theme and the consultations suggested social innovation generated many high quality proposals. The theme 'work places' did not attract as much interest.

A series of events were held to coincide with the **UN's International Day of Older People (1st October 2012)**. Highlights posted on the EY2012 website include:

- Belgium - Lectures and activities at Brussels' Town Hall;
- Bulgaria - Flashmob in Dobrich, organised by Europe Direct;
- Czech Republic - Senior Fest;
- France - Les fleurs de la fraternité;
- Ireland - Third Age Conference, in Dublin;
- Italy - Month of the Elderly in the Province of Rovigo;
- Liechtenstein - Festival of the Generations;
- Luxembourg - Activities in collaboration with Club Senior;
- Romania - The Seniors Awards Gala, in Bucharest;
- Slovenia - 12th Festival of the Third Age;
- Spain - Launch of the book "The experience of ageing";
- The Netherlands - WorldGranny Bike Auction in Amsterdam;
- UK - The Big Skills Share.

The **European Year 2012 Closing Conference in Cyprus (10 December)** was a smaller, more low-key event compared with the opening event and the main highlight was the launch the Active Ageing Index (AAI), developed by the European Centre for Social Welfare Policy and Research (Vienna), in collaboration with the United Nations Economic Committee for Europe (UNECE) and the European Commission DG Employment, Social Affairs and Inclusion. The objectives of the Conference were to: celebrate the achievements and main highlights of the Year; provide a forum for discussion on the ways to transform the momentum gained into concrete actions based on main the strands for active ageing and solidarity between generations; enhance the commitment from key EU and national actors for political measures that are necessary in order to address the issues older people and all generations face; identify and exchange good practices related to current policy reforms. The Guiding Principles on Active Ageing were also presented, together with a number of good practices on employment, independent living and participation. A final session was dedicated to the main achievement of the Year and the way forward<sup>62</sup>.

#### 4.6.2 *Press and media*

The following statistics are from the 'clippings' reported by PAU Education, and specifically relate to items where the Year is explicitly mentioned (Jan 2012 to Feb 2013). In their analysis PAU Education 'scaled up' the numbers using a multiplier of the official numbers of copies sold for each

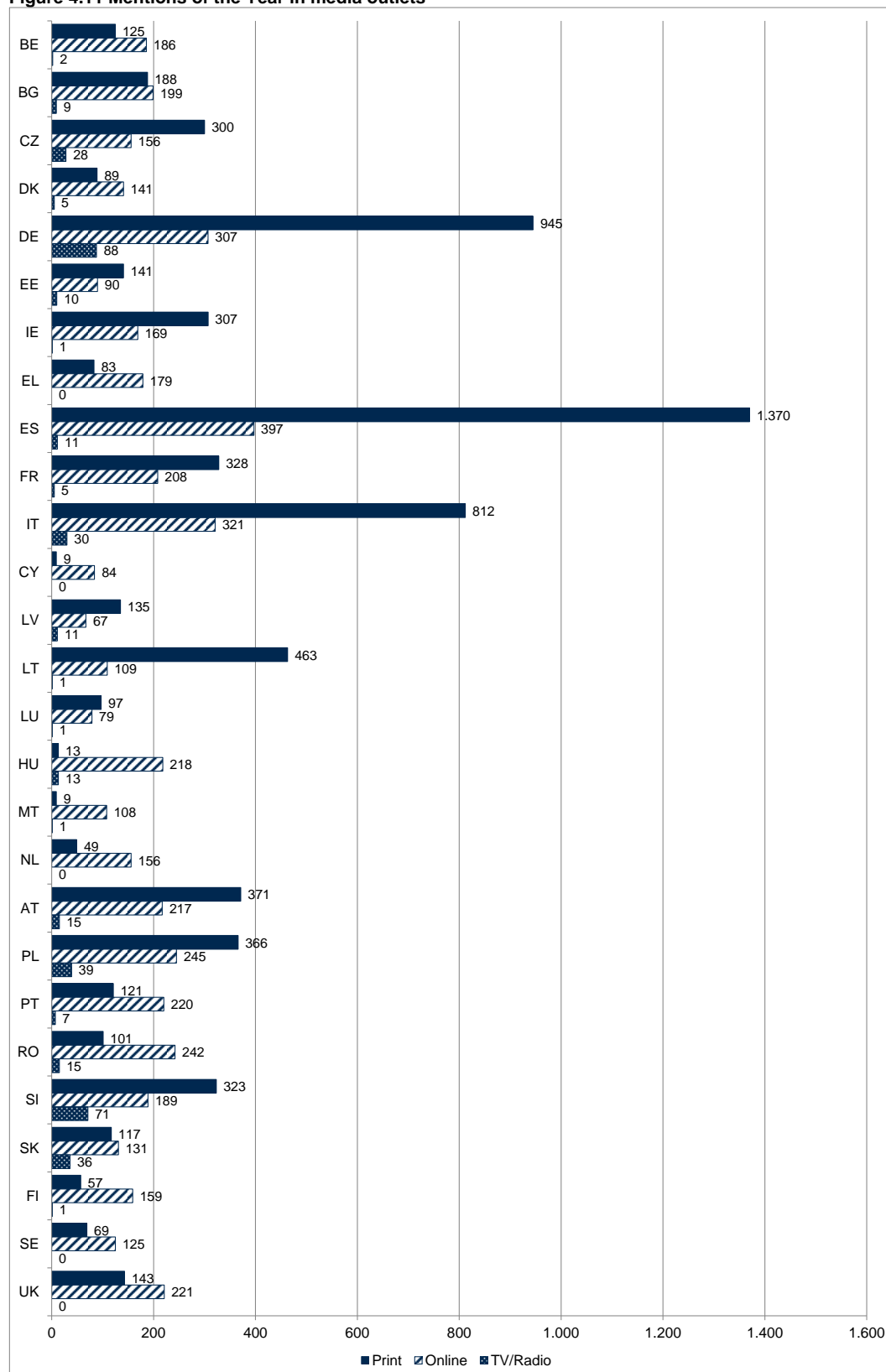
<sup>62</sup> <http://www.cy2012.eu/index.php/en/file/rtuQji1Gaqn2nxXo9+AUZw==>

of the newspapers that were monitored. The use of such a blunt multiplier assumes first that the copies were read, and second that the specific story was read by each and every reader.

Data below show that the Year did actually receive explicit mention in major European media outlets. These mentions were not indirect (for example they did not assume that an article about ageing must have some connection to the Year), but are explicit demonstrations that reporters had been sensitised to the Year and were writing about it in their media outlets.



**Figure 4.11 Mentions of the Year in media outlets**



Source: PAU Education.

The communication contractor representatives suggested prudence in comparing country media results and that factors different from the level of activity might explain them, including a lack of interest by media in certain countries (e.g. UK) and sometime a focus on the negative aspects of the topic. The high number of mentions in media outlets in Spain could be in our view perhaps be explained at least in part by the efforts in organising a structured communication campaign,

“Twelve causes for Ey2012”. This campaign organised by INSERSO with the collaboration of the Unión Democrática de Pensionistas y Jubilados de España had the objective to collect and disseminate the views and recommendations of senior people on twelve themes related to active ageing. For each theme an interactive document has been produced and put on the national website, including also a press note<sup>63</sup>.

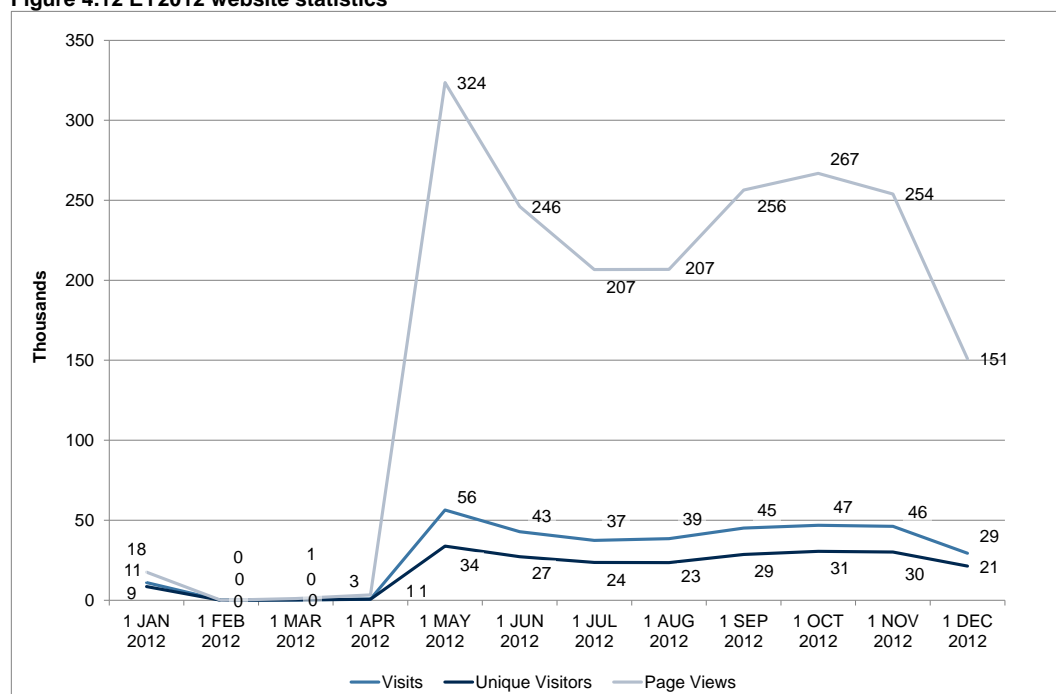
#### 4.6.3 EU Website and social media

The **EY2012 website** (<http://europa.eu/ey2012>) was launched in April 2011 and archived on 30 June 2013. The archiving of the website seems at odds with the DG EMPL annual work programme of grants and contracts 2013, which states that the website: “...will be adapted and maintained so that it can serve as a monitoring tool for active ageing strategies across the EU. Web services including publishing and migration will be implemented through max. 5 service orders using the Framework service contract of DG INFSO, Lot 4, Smart Number 2009/0102, valid until 28/02/2015”.

Available in all 24 official EU languages, the website was built by the EC and so all technical aspects were handled by them and PAU was responsible only for content. An online tool (shared with the EC) was used to publish news, upload content etc. and each addition of material, as well as editing and translations, had to be validated by the EC team. It was reported by the communication contractor that this did not result in any delays and worked well in practice. PAU had a small, separate contract for web content which was in place six months before the start of the Year up until April 2013. PAU's view of the website was that it was not too complicated and had a clear and simple structure. National websites also played a significant role (linked to the EU site).

The website met the communications contractor's expectations and there were 1,371 items posted in all. Figure 4.12 presents a summary of web usage statistics.

**Figure 4.12 EY2012 website statistics**



Source: Ecorys calculations on EC website statistics.

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[http://www.imsero.es/imsero\\_01/envejecimiento\\_activo\\_eu/ano\\_europeo/programa/actividadesoficiales/12causas2012/index.htm#ancla4](http://www.imsero.es/imsero_01/envejecimiento_activo_eu/ano_europeo/programa/actividadesoficiales/12causas2012/index.htm#ancla4)

The figures of 212,822 **unique visitors** compare with 400,000 reported for the EY2010<sup>64</sup> and 366,172 for the EY2011<sup>65</sup>. It is difficult to interpret or draw conclusions on these figures – it may have been the case that online activity was greater on national websites during the EY2012 for example. Many countries had their own national websites. On a positive note there was strong cooperation between PAU, NCs and national stakeholders so that the most interesting national events were identified and publicized on the EU website. It was challenging to chase and secure all the information required about each event so it could be posted on the website. There were also a large number of applications (to have material added to the website), but it was reportedly quite common to have to drop content because of a lack of information forthcoming. Events had to be free to be eligible for inclusion on the website. A strict quality assurance system was applied so everything had to be checked and validated by the EC (the latter were reported to have been engaged and responsive, and very quick to turn requests around). The EC had an overview and more contextual information and so could avoid duplication and ensure balanced thematic and geographical coverage.

#### 4.6.4 Social media

Social media was the responsibility of the EC and was treated as a useful addition to the overall communications effort. PAU was responsible for the contact inbox on the website and a significant number of people made contact through this channel.

The data concerning social media indicates that from January until December 2012, 93 Facebook messages were posted by Social Europe concerning the EY2012. Both Facebook and Twitter were used as a platform to disseminate a wide range of EY2012 messages and examples of activities, but also to stimulate debate and interaction amongst the public or to provide general information or updates. The majority of messages contained a request for opinions, calls for participation, link to another website and especially in the case of Twitter to give general information updates. The content of the messages range from information about EU and (national) activities to competitions and awards to ‘teasers’ of speeches and report results. The dissemination of projects and general interaction with the public were the most frequent purposes of the messages on Facebook.

Although the social media messages were spread across the year, the majority of messages on Facebook were posted in the first half of 2012. A large share of the messages on Facebook and especially Twitter discussed the EY2012 as a whole. When the message on Facebook discussed one of the four themes of the EY2012, it featured intergenerational solidarity most frequently and employment for the elderly less often. On Twitter, on the other hand, messages most often concerned employment issues and independent living featured less often.

All of the EY2012 messages on Facebook reached at least 1,500 people, and the highest numbers of viewers of a post reached was 7,500 people. For Twitter, all of the messages reached at least 6,262 people, and the highest reach of a post was 24,258 people. However the data suggests low levels of engagement with these messages<sup>66</sup>. The same applies to the generality of Social Europe posts and messages in the past.

Overall then, the degree of engagement with social media on the part of participants and stakeholders appears limited, certainly at the EU level. Perhaps this is not such a surprise, since the types of news and information discussed (policy level) does not naturally lend itself to this

<sup>64</sup> EY2010 external evaluation report.

<sup>65</sup> EY2011 ex-post evaluation report.

<sup>66</sup> Based on the number of people reached and number of people who interacted with the message by liking it, sharing it or commenting on it (Facebook) and the number of people replying or retweeting it (Twitter).

media channel. Although no data is available on the use of social media at national level during the Year, anecdotal evidence suggests (and logic dictates) that this was more significant than at EU level. For example:

- in Portugal the Facebook page of the Year received 1.210 “likes”, 76,4% of which by women (24,6% of which between 25 and 34 years);
- the Spanish evaluation reports that activity developed via on-line tools including web, Facebook and Twitter reached over 700 000 people.

## 5 Gender mainstreaming and accessibility for people with disabilities

In this section we address the following evaluation questions:

EQ9 - How and to what extent was the gender dimension taken into account in initiatives, at EU and national level?

EQ10 - How and to which extent was the accessibility of the activities ensured for persons with disabilities?

### 5.1 Gender

In order to answer whether and to what extent the gender dimension was taken into account during the EY2012, we considered two areas, namely:

- The content of the EY2012 activities;;
- The management and the participation in the main events of the EY2012.

#### 5.1.1 *Gender mainstreaming in the contents of the EY2012*

Through interviews, case studies, a survey amongst national coordinators and desk research we have investigated to what extent and how the gender approach was mainstreamed in EY2012 activities.

We have found that the aspect of gender mainstreaming was considered since the preparation of the EY2012 (as a required section of the National Programme) and included by the Coalition and several Member States. Organisations focused on gender equality played an important aspect in this regard, especially at EU level. We found however that the gender approach when applied focussed almost always on women's specific needs and not also on men's specific needs.

From the start of EY2012, the aspects of gender equality and gender differences were included in the discussion on active ageing and intergenerational solidarity. The EY2012 Stakeholder's Coalition, for example, included the European Women's Lobby and the European's Institute of Women's Health. They were an important push for ensuring the recognition and addressing the gender in the Coalition's Roadmap. Their work resulted in that the Roadmap contained the following commitments:

1. A position paper would be produced 'on the discrimination faced by older women, including accessing their rights to equal pay, a fair pension and protection against elder abuse';
2. The European Women's Lobby's annual conference would address 'the theme of a life-cycle approach to intergenerational solidarity within a gender equality perspective';
3. The Coalition as a whole would promote intergenerational understanding within the workplace between age and gender groups;
4. And that the Coalition encouraged the EU to 'coordinate better and build synergies' amongst other within the 'European Strategy for equality between women and men 2010-2015' and the European Pact for gender equality for the period 2011-2020 and the recommendations regarding the gender dimension of active ageing and intergenerational solidarity adopted by the European Advisory Committee on Equality between women and men'.

Furthermore, the European Women's Lobby produced a manifesto on Women's Socio Economic Rights and Gender Equality from a life-cycle perspective (presented and discussed at the EWL's annual conference), and dedicated one of its editions of their magazine *European Women's Voices* to the same subject.

These commitments and inclusion of women's organisations provided guidance and a push for the Coalition and the Member States to ensure the inclusion of gender mainstreaming in their discussions and actions throughout the year. Several of the Coalition Members indeed commented during the interviews that they appreciated the expertise brought through the participation of the women's organisations in the Coalition. However, as these organisations and the four initial commitments demonstrate, the aspect of gender in the EY2012 has predominantly focused on women. In their work, the focus of gender was placed on care provided by women (related to intergenerational solidarity) and the access and rights to pensions. Indeed, little attention has been directed to the experience of older men.

Furthermore, although many interviewees indicated that they considered and included aspects related to gender in the EY2012, the extent to which the concept of gender mainstreaming was understood and applied by the various stakeholders is questionable. In light of the longer life of women as opposed to men, some organisations did not deem it necessary to focus on gender mainstreaming (reconfirming the narrow understanding of 'gender aspects'). Whilst the experts in gender issues, such as the European Women's Lobby extensively addressed active ageing and intergenerational solidarity, those who were involved in active ageing and intergenerational solidarity did not necessarily address all potential aspects of gender mainstreaming.

At national level, gender mainstreaming was considered slightly differently, including more - although limited - attention to men and to the Lesbian, Gay, Bisexual and Transgender (LGBT) community. Health care and social exclusion were most frequently the subject of the projects. These projects ranged from research activities, to awareness raising (including awards), and direct support to target groups. Several Member States and some cross-country collaborations included the aspect of gender mainstreaming into their work programmes. Examples of such initiatives are the following ones:

- The Active Ageing Index, a research collaboration between the EC and UNECE, which included a data breakdown by gender;
- "The Arctic Change and Elderly Exclusion: A gender-based perspective". A research project addressing elderly people's concerns in the Arctic with a special focus on the concept of exclusion (SE, FI, NO, UK, EE);
- The third edition of the French Active Ageing Awards, which partnered up with a Czech organisation on Gender Studies (FR, CZ, PL, FI);
- Brochure for health-professionals treating patients with dementia, including a person-centred and gender sensitive communication approach (AT);
- The Dementia Engagement & Empowerment Project focused on capacity building, providing resources and conducting research related to dementia, including the experience of the LGBT community (UK);
- The LGBT ageing project aiming to 'open the door to dialogue' and bringing together the most relevant stakeholders and supporting several cultural activities (FR);
- PINK 50+ focused on raising awareness amongst organisations and individuals providing care for the elderly and how to be sensitive towards the LGBT elderly community (NL);
- The Project Trio connecting elderly women to families with children under the age of 15 to encourage 'surrogate grandmother' relationships and further intergenerational solidarity and reduce social exclusion (CZ).

Five countries, Portugal, Poland, Slovakia, Spain and Estonia furthermore made note of their attention to gender mainstreaming in their work plans and evaluations.

#### **Portugal**

Gender issues are identified as a main issue in the Portuguese Work Programme and reconfirmed in its national evaluation as well as during the interviews conducted for the case study. Indeed the government's Gender Commission was involved in the EY2012. The share of older women versus older men was found to be high in Portugal, leading to the term "feminization of ageing". Several initiatives, such as Gender and Ageing, have focused on gender and ageing specifically. This project was promoted by CIG in cooperation with 19 public bodies and a private entity (Santa Casa da Misericórdia de Lisboa), directed to public administration officials. Other activities included:

- Issuing the guide Women, Men and Ageing, for social action structures and security forces;
- EU project Breaking the taboo for a training tool on domestic violence on elderly women;
- An issue of the journal of the Portuguese Association of Women's Studies (APEM) on the Gender and Ageing theme;
- Meeting on Gender, ageing and inter-generationality, with a school and a senior academy, involving students and teachers.

#### **Poland**

The Polish organisations recognized the 'feminisation' of the issues related to the EY2012 and focused their efforts on ensuring that elderly men were also involved. For example, the content of several activities was changed in order to attract male participants. For sport activities this included for example a shift from Nordic walking and gymnastics to football. For trainings this shift included for example a new focus on technology, such as how to use a smartphone. The Polish account is one of the few examples of the active inclusion of men into the discussion of the EY2012.

#### **Slovakia**

The Work Programme of Slovakia stresses the gender issues for elderly with respect to employment. Several initiatives focusing on older women have been initiated such as the "Plus for Women 45+" project, financed through the European Social Fund.

#### **Spain**

The Work Programme indicates that gender mainstreaming was an area of focus. In the quantitative and qualitative studies conducted and used, the gender dimension was also taken into account. The Spanish national evaluation mentions relative successful integration of gender issues in campaigns related to the year.

#### **Estonia**

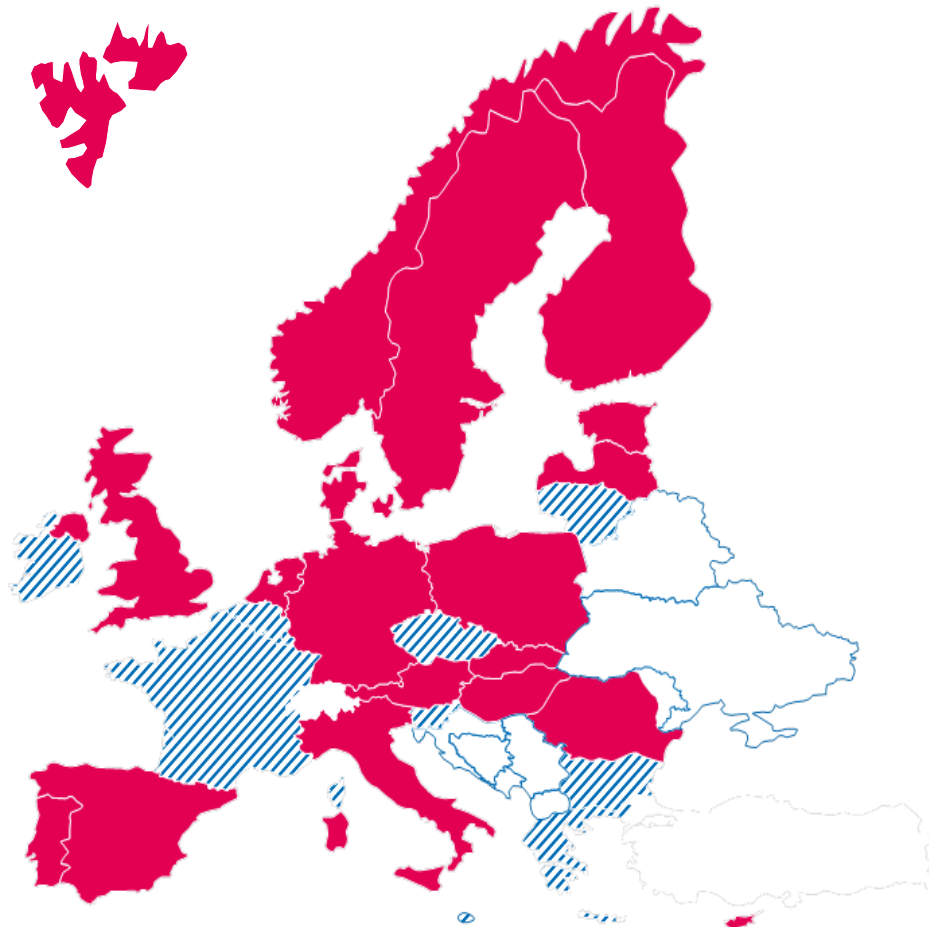
The Estonian government mentioned that the issue of gender is taken into account when planning and carrying out activities, as well as that the department of Gender equality of the Ministry of Social Affairs can provide advice, if necessary. However, a more specific plan of action with respect to this issue is not provided.

### **5.1.2 Gender balance in the governance of the EY2012**

To assess the gender balance in the governance of the EY2012 we have considered the balance amongst the National Coordinators in the Member States and the speakers and participants at national launching and closing events. Based on the available data, it can be concluded that the EY2012 was led predominantly by women and the main national events attracted and included women more often than men.

The map below presents the gender of the National Coordinators per country. Countries in blue/striped pattern had a male National Coordinator and in pink a female National Coordinator. As can be seen from the map, two-thirds of the National Coordinators were women.

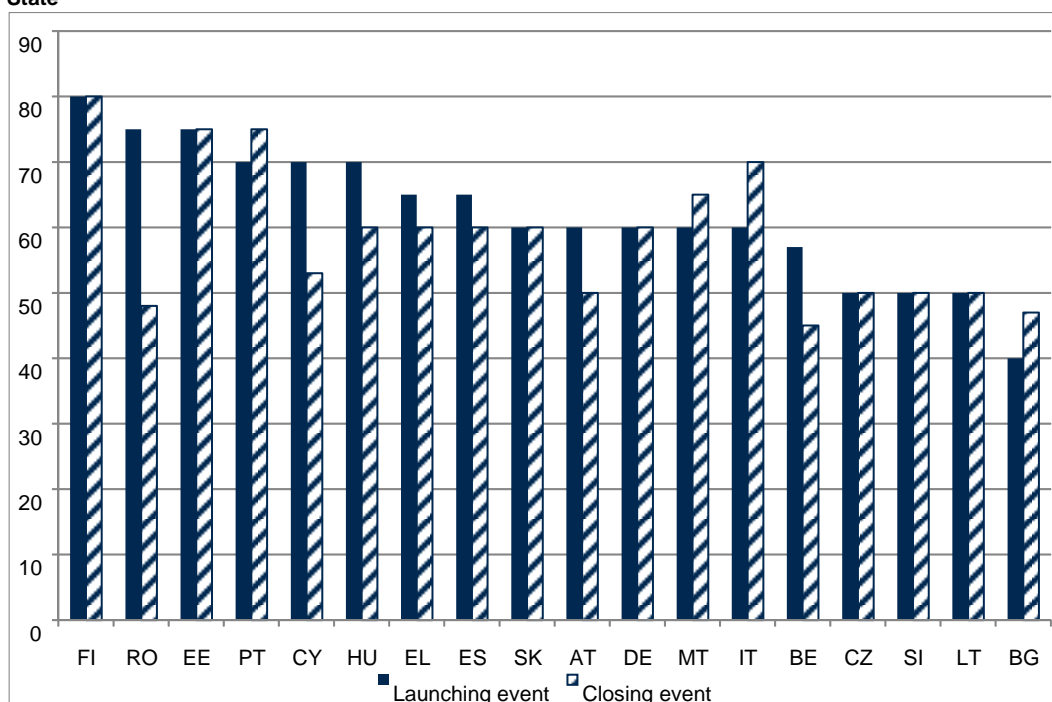
**Figure 5.1 Sex of the National Coordinator in the various countries**



We have also considered the balance between women and men among speakers and participants at national launching and closing events. Based on the available data, it can be concluded that the EY2012 key events attracted and included women more often than men.



**Figure 5.2 Percentage of female participants at the national launch and closing event per Member State<sup>67</sup>**



Source: National Coordinators Survey.

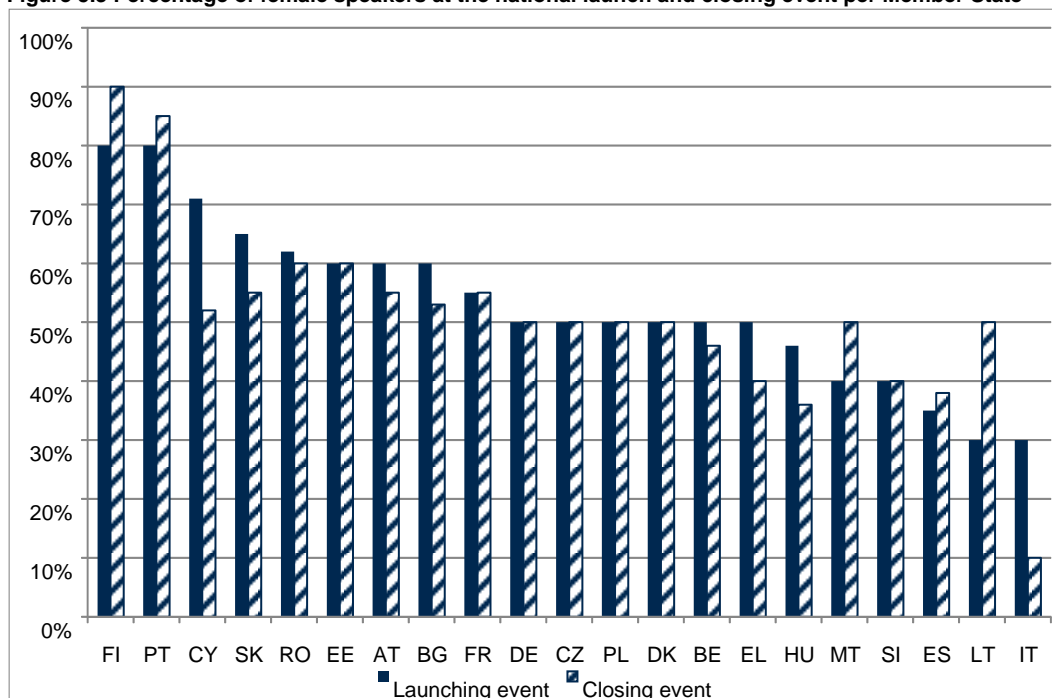
Although participants were more often female than male, as can be seen from the figure, the gender share of the speakers in many of the countries was often close to equal. Only in four countries, Finland, Portugal, Cyprus and Slovakia, women represented a significant larger share (over two-thirds) of speakers than men.

The greater gender balance among speakers can perhaps be explained at least in part by the fact that over 11 National Coordinators applied gender balance as a criteria for selecting speakers.<sup>68</sup>

<sup>67</sup> Data not available for PL, NL, FR, DK, LU, LV, SE, UK.

<sup>68</sup> Information not available for LU, LV, SE, UK.

**Figure 5.3 Percentage of female speakers at the national launch and closing event per Member State<sup>69</sup>**



Source: National Coordinators Survey.

## 5.2 Accessibility

### 5.2.1 Disability issues in the contents of the Year

EY2012 covered a wide range of issues related to disability that elderly people face, especially health and independent living related. Both at EU and MS level, the initiatives addressed disability directly and indirectly. As in the case of gender, there were several Coalition members who influenced the Roadmap and priorities of the EY2012 from the perspective of people with a disability. These organisations include the European Disability Forum, Mental Health Europe, Eurocarers and the European Hearing Instrument Manufacturers Association. Furthermore, the Coalition consisted of other organisations specifically focused on a condition or disease that may result in disability such as Autism Europe, Alzheimer Europe, European Parkinson's Disease Association, International Diabetes Federation, International Federation for Spina Bifida & Hydrocephalus, European League against Rheumatism etc.

Jointly the Coalition ensured that the EY2012 promoted initiatives related to disability issues. Some of these initiatives were explicitly on disability, whereas others covered the subject in combination with other areas of active ageing. Examples of such initiatives include awareness raising, meetings and activities for the public.

#### Selection of EY2012 activities related to disability

##### Papers published by the Stakeholders' Coalition members

- The mental health implications of (un-)employment in older people (MHE);
- A resolution to end violence against older women with disabilities (EDF);
- Charter for Work for People with Rheumatic Diseases in Europe (EULAR);

<sup>69</sup> Data not available for NL, LU, LV, SE, UK.

- Y(our) Return on Investment: position paper on ageing with Spina Bifida and Hydrocephalus (IF);
- The rights of Ageing People with Autism: towards a better quality of life (a joint paper of Autisme Europe and AGE).

Conferences and workshops organised by the Coalition members:

- 17-18 May: Workshop, Design for All, organised for ENSA Disability members, the Elderly Thematic Networks, and ELISAN European Network members;
- October: an IF Workshop on employment and ageing with disabilities;
- 16-18 October: An ENSA meeting on elderly and disability twinned with a general conference on the EY2012.

Initiatives:

- Prize for "Living with and despite the Alzheimer disease" to promote innovative initiatives implemented in dementia care;
- Story bank on ageing (EFC), including stories about ageing with a disability;
- The EFC Consortium led the League of Historical and Accessible Cities;
- SensAge – Lifelong learning needs for ageing people with sensory disabilities;
- VISAL - Visually Impaired Seniors Active Learning.

Interviewees from the EU Stakeholders' Coalition highlighted the importance of the organisations in the Coalition to push for the focus on the activities. The content of these activities by and large centred the discussion of disability on accessibility and independent living. The activities in the Member States also included this angle, in particular in relation to (changing) assisted living and technological developments. In the Netherlands and Bulgaria, for example, multiple initiatives supported research, awareness raising or the use of interactive technologies to support the less-able elderly. Whereas in Portugal the national plan was aligned with the national plan on disability.

### 5.2.2 *Accessibility to the Year's activities for disabled persons*

The initiatives of the EY2012 by and large ensured the accessibility of the built environment at events and considered various aspects, such as sign language and transportation at various occasions.

Many of the EU level interviewees indicated that they considered most EU events to be well prepared to ensure access for all and that some events included sign language interpretation or speech to text facilities.

The EU website contained options for larger fonts.

In participating countries, the majority of National Coordinators indicated that (almost) all locations for the initiatives were selected and adapted to be accessible in terms of both the built environment and in terms of suitable transportation. Over half of the National Coordinators furthermore highlighted that transportation was arranged when necessary.

#### **Quotes from National Coordinators on ensuring access to facilities**

"Attention was paid to ensure accessibility of the buildings";

"The places for events were picked up to assure the accessibility";

"We only selected venues that were fully accessible for people with a disability";

"We made sure that all venues were easy to reach using different modes of transportation. We were ready to provide assistance on demand. A member of our team assisted a nearly blind person on two occasions";

"Organizers ensured transportation only for few old-aged participants";

“Coordination of the EY2012 was supported by an Operational Team, specialized to ensure accessibility for people with disabilities”.

In few of the Member States, however, the access to large font-size documents, sign language interpreters or speech-to-text facilities were not guaranteed for all initiatives. These services were not considered as necessary for all types of events.

#### Quotes from National Coordinators on ensuring access to communication materials

“Our communication strategy used internet, social media, but also hard copy (on paper) so that we also could reach people that are not familiar with the internet. Large font option are available on the website of the EY”;

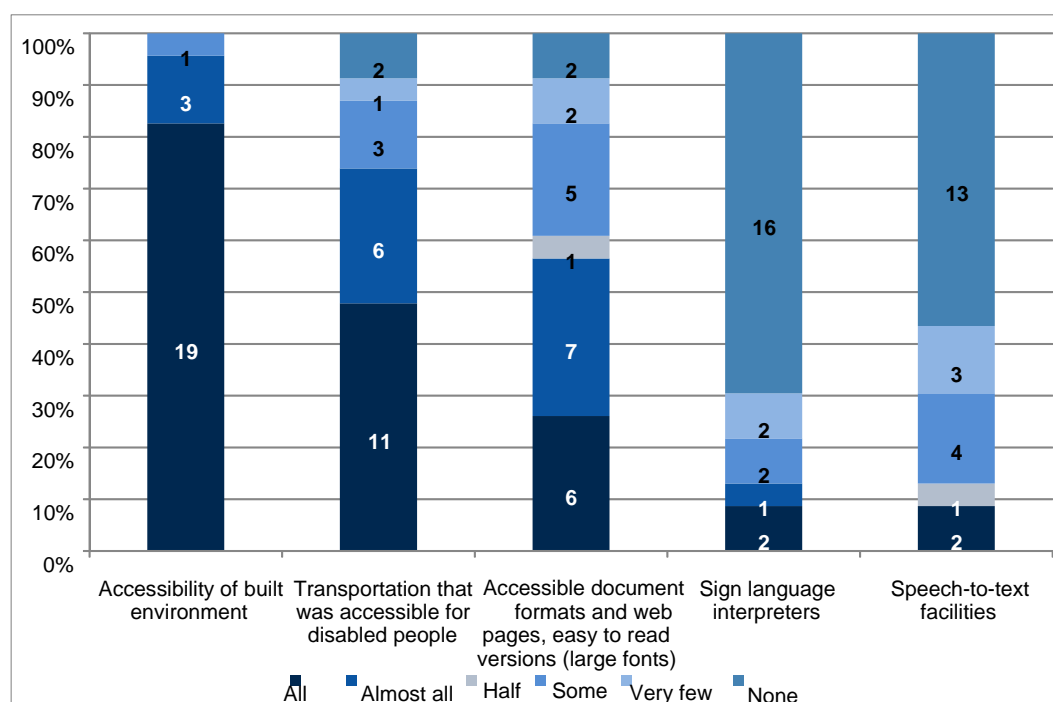
“We used easy to read documents with large fonts”;

“As far as we know there was no demand for sign interpreters during the activities organised by the national coordination team. We did provide interpretation into and from the two main languages and in some sessions to and from English”;

“Extensive summaries of the Closing Conference, the debate and the seminars at the Book Fair have been published on the website”.

The following figure provides an overview of consideration to accessibility in the initiatives across the Member States.

**Figure 5.4 Proportion of initiatives where accessibility aspects were considered (number of countries)**



Source: National Coordinators Survey.





## 6 Efficiency and delivery mechanisms

In this section we address the following evaluation questions:

EQ8 - Was the EY2012 implemented efficiently or could better results have been achieved with the available resources (human and financial) at the EU level?

EQ 11 - How relevant and effective were the management structures and delivery mechanisms at EU and national levels? Could alternatives be envisaged?

EQ 12 - How, and how effectively, have relevant stakeholders (regional, national authorities and NGOs and social partners) been involved (at the EU and national levels)?

### 6.1 Resources and results

The “budget envelope” set out in the legal Decision and applying to the period January 2011 to December 2012 amounted to some €5 million. This amount was derived from existing financial appropriations. This represents a similar approach to that taken for the European Year of Creativity and Innovation 2009 (although in the latter case the amount of funding drawn from existing budgets was less).

This compares with the following parameters for recent European Years:

**Table 6-1 Funding of previous European Years**

Year	Total (M€)	National grants	EC Staff resource (FTE)
European Year for Active Ageing and Solidarity between Generations 2012	5.00 <sup>70</sup>	-	4-5
European Year of Volunteering 2011	10.75 <sup>71</sup>	3.70	No information
European Year Against Poverty and Social Exclusion 2010	17.25	9.27	5.0

According to the DG EMPL annual work programme of grants and contracts 2012, ‘available appropriations’ (drawn from the general DG budget) were €2.7 million for the EY2012 of which €2.31 was reserved for procurement. This procurement element was used to finance the communication activities of the Year (EU website, communications support to MSs, publications, videos, press work etc.) and also covered external evaluation and activities and events around stakeholder engagement. A grant was made for co-financing the closing event (€350,000). Moreover, the DG EMPL 2011 annual work programme had already secured €2 million for the first communication contract and € 300,000 for the opening conference. The EY2012 falls within the lower end of the range of European Years, second only to the least funded Year, the EY2009, which also did not have any specific funding allocated. Nonetheless the evidence suggests that a great deal was achieved by the EY2012, to some extent mirroring the findings of the EY2009 evaluation (i.e. that in-kind and non-EU resources can be mobilised effectively and outcomes and impacts are not

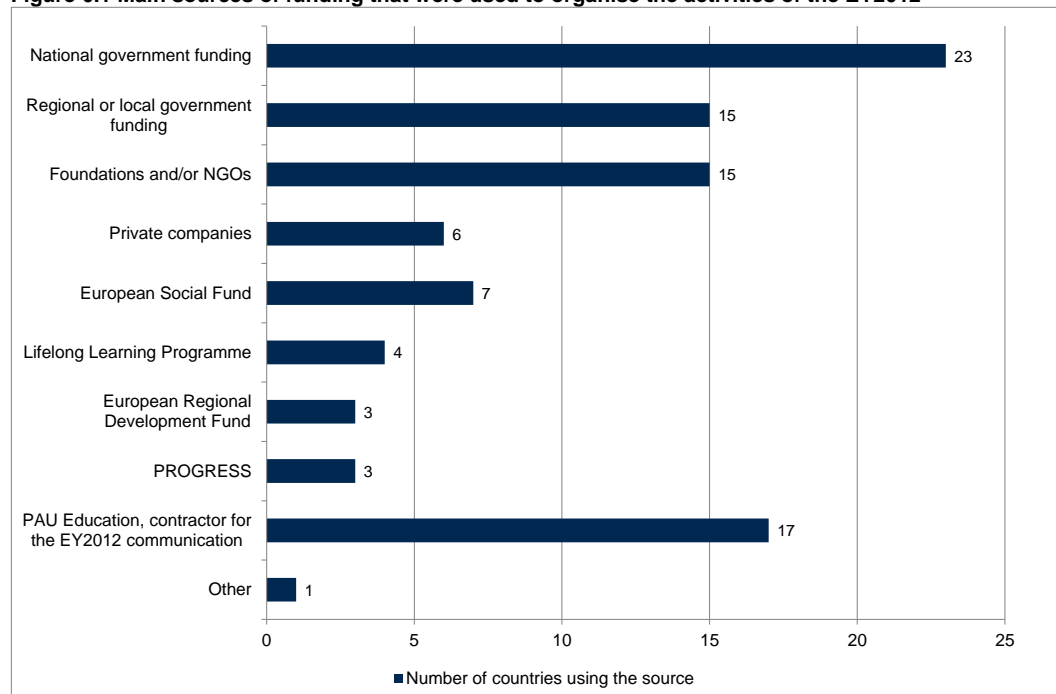
<sup>70</sup> For 2012 only – additional funding was applied during 2011 and for follow-up activity in 2013, but exact amounts are difficult to quantify

<sup>71</sup> Includes funding allocated for the preceding and following years, 2010 and 2012.

necessarily directly proportional to direct levels of spending). It may therefore be argued that comparable results (at least) were achieved using fewer resources than in other European Years.

Figure 6.1 demonstrates the data from the online survey of NCs and provides an insight on how the approach described above worked in practice, i.e. the types of funding sources that were used at country level.

**Figure 6.1 Main sources of funding that were used to organise the activities of the EY2012**



Source: National Coordinators Survey.

Opinions on the amount of resources applied, and the balance between different activities, suggest that Commission staff resources were adequate; although a greater degree of continuity would have been better (the team was around 4 or 5 people, whereas only two remained in place throughout). The evidence indicates the internal team was efficient and in particular worked productively and collaboratively with the other key actors in delivering the Year; in particular through positive relationships and cooperation with the media contractor, other DGs (through the inter-service group), NCs and the AGE Platform. Resources were also sufficient to ensure strong participation of civil society organisations in EU level events – an important outcome in terms of the inclusive nature of the Year and engaging multiplier organisations.

The evidence from interviews with EU stakeholders highlights a number of concerns, many of which are consistent with the findings from evaluations of previous EYs: resources are never going to be enough given the scale of the challenge; many stakeholders would like to have seen fewer resources directed at public relations activities and more at national and local-level activity, and more of a focus on ‘concrete actions’, capacity building and NGOs on the ground. Examples of opinions collected from EU level networks of NGOs and local and regional authorities in this context include:

“It’s a shame that money goes to the communication strategy and not to the NGOs that can reach out to MS level”.

“Less money on PR, for example conferences without real debates. More money on NC meetings (to get high level people) and small events better suited to discussion”.



“There should have been less money on awards and more money to organise local events and capacity building workshops”.

Equally, others note the decreasing trend in the amount of resources available for EYs and the increasing difficulties of organising activities. There are also calls for greater use of online channels (e.g. online debates, a YouTube channel for EY2012, dedicated social media accounts etc.). The communications contractor reported that communication tools were well received, were very popular, and many countries requested more items; although the materials were also quite costly to produce.

When asked about which activities achieved results with relatively small amounts of funding, stakeholders highlighted the EY2012 website, social media, competitions/awards and the work of the AGE Coalition. At country level, Generations@school was again mentioned as a particularly cost-effective initiative.

In terms of whether or not direct funding to Member States would have achieved better results, most stakeholders think this unlikely, highlighting the added administrative burden applying for grants (for both beneficiaries and the EC), and the issue of diversity (under a grant-based system countries are usually allocated an amount based on population, but this doesn't always reflect relative ability and capacity to use the funds effectively). Lack of direct funding is not perceived to have had any detrimental effect in terms of long-term commitment and impact. It was also clear from the feedback that stakeholders perceived fewer tensions and better cooperation between stakeholders and the EC during the EY2012, compared with other EYs (implying that without a grant-based system there is less competition between NGOs and a collaborative or joint approach is easier to promote).

Yet a number of stakeholders agreed that more could have been done if more resources were available. Examples cited by consultees include doing more on communication and awareness-raising at local level (*“...the video clip could have been better adapted to the national context. As it was, it remained a bit abstract”*); being careful about local sensitivities (*“...in Poland showing older people happily going in vacation did not match well with the difficult financial condition of the elderly”*); and providing interpretation facilities and conducting press work in more languages to make it easier to engage national and local journalists.

## 6.2 Management structures and delivery mechanisms

Management structures and tools employed at **EU level** were appropriate and functioned satisfactorily. Working relationships between the EC, NCs, EC Representations, stakeholder groups and the communications contractor were strong and a high degree of collaboration and cooperation was achieved, which served to increase the effectiveness of the Year.

The Commission's **Inter-service Group (ISG)** was active and included a range of DGs, although some were more active than others. The degree and level of inter-service cooperation on the EY2012 was relatively strong, in particular with DG SANCO and DG CONNECT; where there were particular, pre-existing policy synergies. For DG SANCO the EY2012 (ISG) was established at the same time as the Innovation Partnership initiative on Active and Healthy Ageing was being developed (also involving DG CONNECT). DG CONNECT was involved in terms of the preparations for the Year, and was therefore able to share its expertise and experience with SANCO, JUST, EMPL etc. DG CONNECT was well placed to contribute as a result of a long track

record of activities and initiatives on how to use technology to support active and healthy ageing, since the theme of the Year has been an integral part of DG CONNECT's activities for at least eight years. This work includes large-scale initiatives based around innovation, services and social inclusion. DG SANCO also had been driving change for many years prior to the EY2012. From a stakeholder perspective however, an interviewee from a EU level network felt that the part of the Commission other than DG EMPL should have been more visible; and that the opportunity to involve wider areas of DG EMPL itself were not fully realised.

The results of the survey of NCs indicate high levels of satisfaction with the **planning and functioning of NC meetings**: the vast majority (92%) were satisfied or very satisfied with this aspect. This finding is supported by the interviews with EC and communication contractor representatives: most found the meetings very useful and fostered a valuable connection between MS and EU levels. Meetings were held approximately every three months (12-14 in all) and this was considered an appropriate frequency. The meetings were used to learn from previous EYs, to establish national steering groups and encourage the generation of national work plans. The communication contractor was also involved in the meetings, which proved a valuable approach. There was a late start to the Year, with only six weeks to prepare, including the Christmas period. So it was helpful that PAU had already been introduced to and had engaged with the NCs and other key players before the official start of the Year.

In terms of organisation of the **communications component** of the Year, cooperation and interaction between the Commission team, PAU, the EU Representations and NCs feedback was positive overall. The EC and PAU had daily contact and a weekly conference call and the evidence also indicates there were strong working relationships between PAU the AGE Coalition and the NCs. Key success factors here were responsiveness, flexibility, and meeting the specific needs of each country. Engagement with the AGE Coalition was very positive from PAU's point of view. PAU's staff member based in Brussels played a pivotal role and was responsible for liaison with the Coalition. A close relationship developed which included regular meetings (at least monthly) together with interactions with individual Coalition members and communication via the Newsletter throughout the Year. The majority of NCs were based in national ministries. PAU assigned country co-ordinators to work with NCs on the national campaigns, which encompassed national tailoring of SeniorForce Days, Generations@School, the Awards initiative etc. This had to be done taking account of wide variations between countries in the resources available. Feedback received by PAU from the NCs (e.g. at NC meetings) was reportedly positive and appreciative of the support provided. PAU's approach was not to impose direction or activity from the top down but to provide support to whatever the NC was implementing (in line with the resources available and prevailing national contexts). Press releases were provided by a media relations sub-contractor, which was provided with feedback by the Commission to help improve quality.

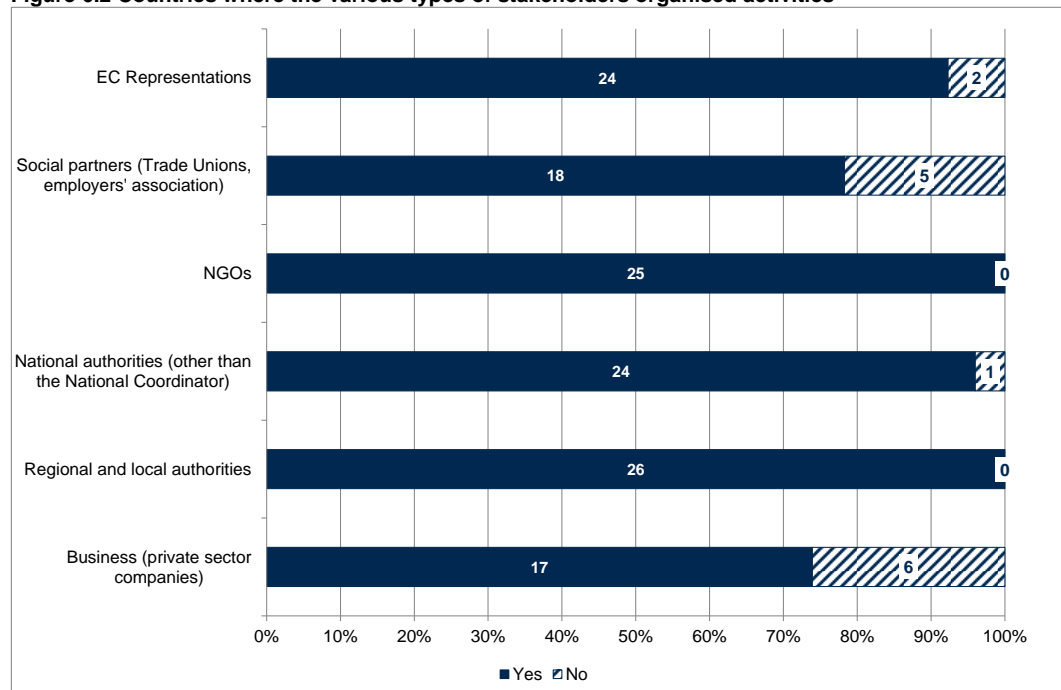
In terms of suggestions for improvements in future European Years timing emerged as a significant issue: the EY2012 was relatively late in gaining final approval, although fortunately some valuable preparation activity had been carried out during 2011 and some key mechanisms were already in place (e.g. the stakeholder coalition). The timetable did however present some difficulties and had some significant impacts, notably contracting delays resulting in the lost opportunity to deliver the Seniorforce initiative at EU level and link it to the awards, and the compressed timeframe available to organise the journalists' conference.

The data available suggests that mechanisms at **national level** were effective in delivering a variety of activities across a range of relevant themes. Spending was dependent on national resources together with using existing EU programmes and the support provided for communications work through PAU. Several countries were particularly active including Austria, the

Baltic countries, Cyprus, Luxembourg and Slovenia (based on numbers of press clippings recorded, entries for the awards and activities added to the EY2012 database).

The survey results give an indication of the **number and variety of organisations** involved in delivery at national level (see Figure 6.2 below). This data suggests participation was fairly balanced, and that (unusually for European Years) the private sector was included.

**Figure 6.2 Countries where the various types of stakeholders organised activities**

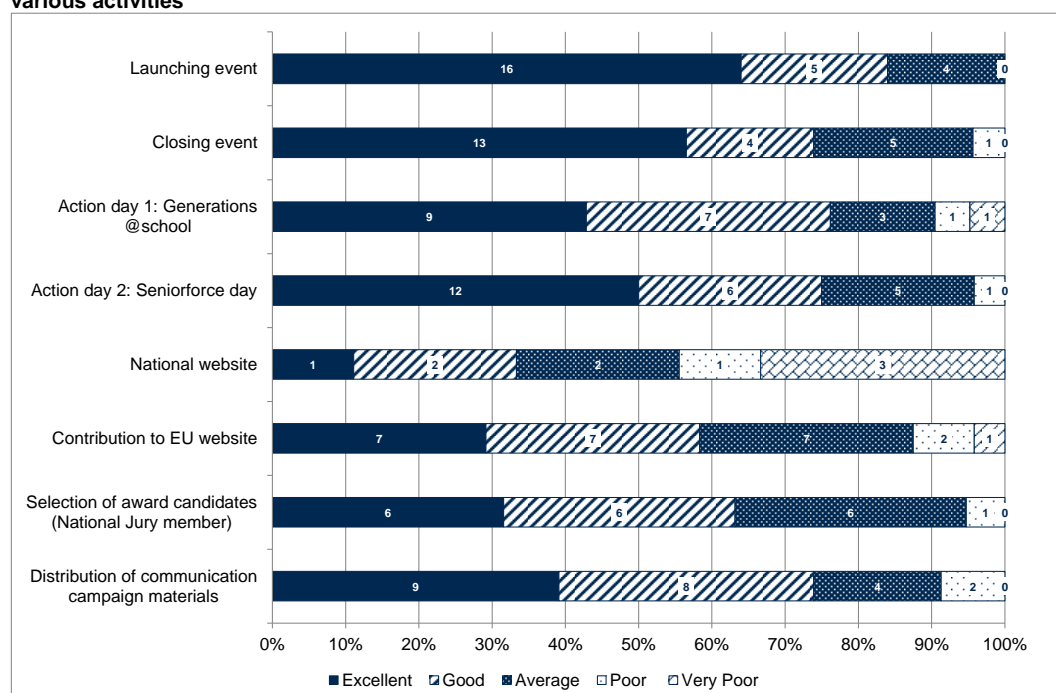


Source: National Coordinators Survey.

There is also evidence that in the majority of countries, stakeholder steering groups or coalitions were established at national level to help guide the development and delivery of activities, in cooperation with NCs and EC Representations.

As Figure 6.3 below shows, NCs rated **cooperation with the communications contractor** highly. The highest approval rating applies to the launch and closing events (organised by EU Presidencies, with support from PAU), and the actions days. Organisation of campaign materials and selection of award candidates were rated good rather than excellent, and interactions concerning national and EU websites appear distinctly average.

**Figure 6.3 National Coordinators' assessment of their cooperation with the communication contractor in various activities**



Source: National Coordinators Survey.

According to the online survey, a high percentage (85%) of National Coordinators were satisfied or very satisfied with their **cooperation with EC Representations** in their country.

Suggestions for improvement of the organisation of future Years revolved in particular around making more resources available for localisation of media materials and translations.

## 6.3 The involvement of stakeholders

### 6.3.1 EU level

At EU level, stakeholder involvement was well organised, based on a partnership approach and valued highly by those involved. An inclusive, open and joint approach paid dividends in terms of informing the development and delivery of the Year; and stimulating continuing partnerships and networks in future.

There is evidence from interviews that EU level stakeholders were very satisfied with the **coordination provided by the EC team**. A strong sense of joint responsibility and a partnership based on mutual trust emerges. The openness and willingness on the part of the Commission to listen to stakeholders' views is accorded high praise in the feedback, together with the level of commitment shown. The results of consultations also exhibit high level of appreciation for the EC team keeping stakeholders up-to-date and for the branding of the EY. The Commission also received praise for cooperation with the European Parliament, including for developing the EY concept and disseminating a clear position on inter-generational solidarity.

Comments from interviewees included:

“Considering the scarce available resources there has been much commitment and sensitivity on the part of the EC team”.

“Very satisfied. They were very open for stakeholders to come with opinions and they tried to involve us in the organisation”.

“The Commission tried as much as possible to involve the stakeholders and keep them up-to-date. They were accessible and they were interested”.

The evidence also suggests the **Stakeholders’ coalition meetings** were well organised and worked well, driven by highly motivated participants and with little friction. There were about 50 members and about 20 of these were active and attended meetings regularly. The meetings were particularly useful during the run-up to the EY2012, and including the media contractor meant a shorter lead-in time once the Year was actually underway. Stakeholder feedback indicates strong approval for the information sharing aspect and the newsletter sent to members was considered valuable. There is also evidence of exchanges and interaction between the regular meetings: “AGE played a prominent role in facilitating stakeholders’ involvement. We were in constant dialogue and they were involved in all stages” and overall an effective balance appears to have been achieved between the EC leading and acting in concert. The role of the coalition was also to provide a wider context to individual organisations: “AGE really added value and invested a lot. Information and communication was very well done; they [AGE] summarised everything, so we had a wide overview of the Year”.

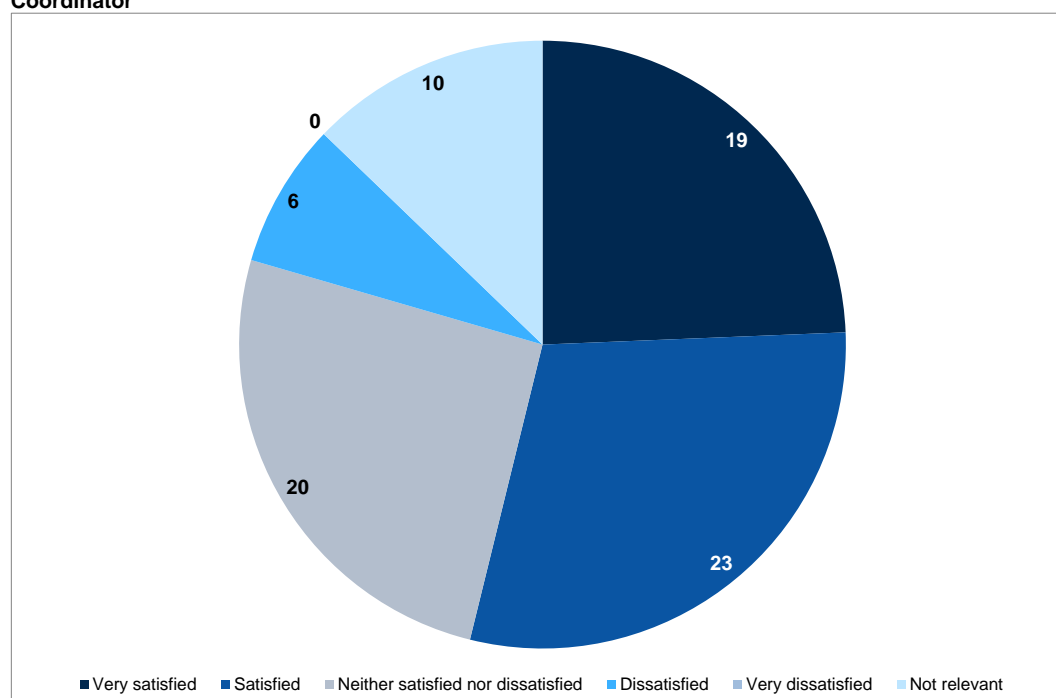
Members also perceived that DG EMPL worked more intensively with other DGs, and that there was better coordination compared with previous EYs. Interaction with DG EMPL was welcomed by the stakeholders involved and one commented that one result has been that they now also interact differently with DG EMPL, and that the local level is now more considered by DG EMPL. The Coalition was also involved in the juries for the EY2012 awards, and in organising presentations on the EY2012 together. One result is a partnership around the EIP-AHA initiative.

### 6.3.2 National level

A range of stakeholders participated, as shown by the analysis of the initiatives in the EY2012 database: this included strong involvement by NGOs, national authorities (other than NCs), regional and local authorities and EC Representations. Social partners and private sector companies were also represented. This evidence suggests delivery mechanisms were able to involve a cross-section of appropriate stakeholders in the Year at national level; and facilitated the engagement of a range of regional organisations as well. Since almost all countries had some form of national stakeholder committee or coalition this is likely to have played a role in achieving this result.

In addition, the results of the online survey suggest a high level of satisfaction among stakeholders in terms of cooperation with NCs (see Figure 6.4 below).

**Figure 6.4 Satisfaction of national stakeholders regarding their cooperation with the National Coordinator**



Source: National Stakeholders Survey.

## 6.4 Coordination between EU and national level

Stakeholder feedback in particular suggests cooperation and linkages between the EU and national level was a successful feature of the delivery mechanism for the Year, and comparatively better than has been the case during previous EYs. The survey results also indicate that NCs were satisfied with communication and coordination between **EU level and national level management** structures (58% satisfied and 23% very satisfied).

## 7 Sustainability

In this section we address the following evaluation questions:

EQ 13 - To which extent is the EY2012 likely to provide a lasting effect?

EQ 14- Which type and area of initiatives, delivery mechanisms and stakeholders involvement were particularly successful in providing lasting effects?

### 7.1 Indications of lasting effects at EU level

The EY2012 ended with a formal declaration on the Council, supporting Guiding principles on Active Ageing. This important document, and in general the sustainability of the achievements of the Year, require concrete commitments aimed at substantiating the principles. In this section we discuss the most significant follow-up initiatives at EU level, including repetition of successful initiatives. Our conclusion is that there is some ground for sustainability of the agenda-setting effects of the EY2012 in the various ongoing follow-up activities. We see however a slight risk that the connection between policy areas might be lost if the successful forms of coordination experimented in the Year are not sustained and strengthened.

The individual policy aspects of active ageing have been subject of policy activity at EU level before the EY2012 and continue to be such after the Year. It would be therefore confusing to consider as follow-up initiative to the Year any initiative that has to do with issues like pensions, long-term care, health of the elderly but does not make explicit reference to the theme of active ageing.

In our view the sustainability of the Year is better described by the continuation of activities that keep the specific approach promoted by the Year to the ageing issue, namely:

- a positive approach to ageing issues (not only as a problem);
- holistic and interdisciplinary concept of active ageing encompassing health, employment, participation and consequent work across policy domains;
- intergenerational solidarity.

Moreover, sustainability can be considered likely if there are concrete entities in charge of promoting this approach.

The European Commission has continued to follow-up on the legacy of the EY2012. At the policy level, the Social Investment Package Communication produced by DG EMPL has kept the intergenerational approach alive. In fact, under the heading Social Investment throughout the individual's life the Commission urges Member States to implement the recommendations on Investing in Children and Policies to Reduce Early School Leaving, and to use the Guiding Principles for Active Ageing and Solidarity between Generations and the Active Ageing Index. The Social Investment Package is important because it also guides the use of the European Social Fund that is a major resource pool for the implementation of social policies. Besides methodologies to support the life-course approach, the Commission commits to work together with the SPC in 2013 on a report on long-term care policies to support healthy and active ageing and raise the capacity for independent living of people of all ages. And indeed a report on long-term care has been published during the 2013 with clear connections to the knowledge developed during the

Year<sup>72</sup>. Moreover, DG EMPL has also launched a call for proposals opened to Member States authorities to develop comprehensive strategies on active ageing<sup>73</sup>. Although not strictly connected to the Year, the implementation of the White Paper on Pensions is part of the broader active ageing agenda and continues; a major international conference on Two Years of the Pensions White Paper is planned for spring 2014<sup>74</sup>.

DG SANCO, and DG CONNECT have continued to work with a large number of scientific partners and stakeholders on the EIP-AHA, the other important legacy initiative of the Year. Although mostly focused on health and independent living, the EIP-AHA has kept a link with broader social and environmental policies in its component on innovation for age-friendly buildings, cities and environments, which is led by AGE Europe. The European Commission and WHO are working together to produce a version tailored to Europe of the guidelines for age-friendly cities published by the international organisation. In summer, a brochure has been produced with good practice examples of innovation<sup>75</sup>. The EIP-AHA is holding its second conference of partners on November 25, 2013<sup>76</sup>.

Other DGs have followed up on specific aspects of active ageing, for instance DG JUST via its European Network of Experts on Gender Equality has published a study on gender gap in pensions<sup>77</sup>.

If these activities represent a promising basis for the sustainability of the Year's effects in EU policies, we note a tendency of each DG to withdraw in their component of active ageing (employment/pensions, independent living/health) that could on the long run reduce the strength of the holistic approach proposed in the EY2012.

Supported by the Committee of Regions, the promotion of a Covenant of Mayors on Demographic Change was in process when we conducted interviews with EU stakeholders and at the moment of writing this report there is not yet sign of its actual implementation on the web. This initiative could represent an important follow-up action to ensure a growing and stable commitment of local authorities.

Regarding the EU social partners, ETUC has launched a new project on ageing after the success of activities in the EY2012 and has adopted at the end of the EY2012 a detailed Action Plan on Active Ageing and Solidarity between generations<sup>78</sup>.

## 7.2 Indications of lasting effects at country level

Based on the information collected in the participating countries, there are indications that the effects of the EY2012 are lasting beyond EY2013 and at least some of them will be sustained over a longer time.

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<sup>72</sup> OECD Health Policy Studies A Good Life in Old Age? Monitoring and improving quality in long-term care, OECD/European Union, 2013.

<sup>73</sup> Call for Proposals VP/2013/009.

<sup>74</sup> Implementation of the Pensions White Paper. Status as of 28 September 2013, <http://ec.europa.eu/social/BlobServlet?docId=11067&langId=en>.

<sup>75</sup> European Innovation Partnership on Active and Healthy Ageing Excellent innovation for ageing A European Guide, <http://ec.europa.eu/digital-agenda/en/newsroom/all/brochure>.

<sup>76</sup> [http://ec.europa.eu/research/innovation-union/index\\_en.cfm?section=active-healthy-ageing&pg=partners-conference-2013-programme](http://ec.europa.eu/research/innovation-union/index_en.cfm?section=active-healthy-ageing&pg=partners-conference-2013-programme).

<sup>77</sup> [http://ec.europa.eu/justice/gender-equality/files/documents/130530\\_pensions\\_en.pdf](http://ec.europa.eu/justice/gender-equality/files/documents/130530_pensions_en.pdf).

<sup>78</sup> <http://www.etuc.org/a/11018>.

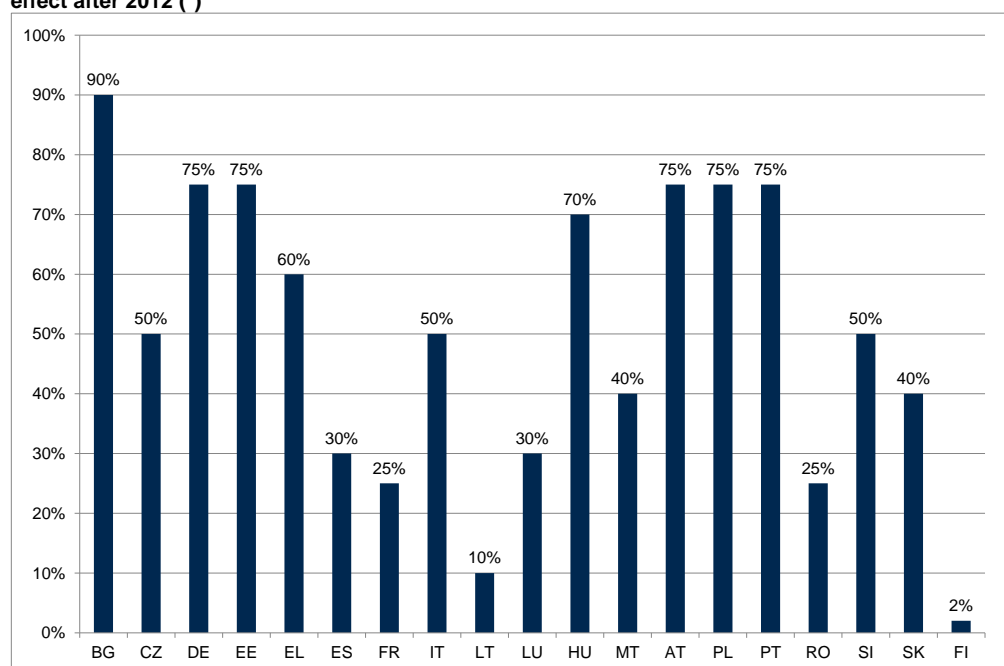


A large majority of National Coordinators confirms that at least some of the activities undertaken during the Year will last beyond 2012 and 11 countries report that this is the case for at least half of the activities (see Figure 7.1 below).

Some successful events and activities had a new edition in 2013. Of the initiatives promoted at EU level:

- Generations@school will be repeated in Bulgaria, Greece, Hungary, Lithuania, Poland, Slovak Republic;
- the activities of the Senior Force Day will be repeated in Bulgaria, Germany, Portugal, Sweden;
- Moreover, a number of locally designed initiatives will be repeated.

**Figure 7.1 Estimated percentage of activities that were initiated during the EY2012 and have a lasting effect after 2012 (\*)**



(\*) Not all the countries are in this graph since some of the NCs did not provide an estimate.

Source: National Coordinators Survey.

Also among stakeholders, more than one third of the respondents is aware of successful initiatives of the EY2012 that were repeated or continued in 2013 and beyond.

Moreover, twelve countries have created some kind of link between the EY2012 and the EY2013 of Citizens: contacts between the National Coordinators of the two Years to share experiences (e.g. Czech Republic, Poland, Portugal, Slovenia), mention of the EY2013 at events (Lithuania, Romania). The author of the linking was often the EC representation (e.g. Sweden, Lithuania). There were however countries where the link was not made as the two themes were considered too different (Belgium, the Netherlands).

**Table 7-1 Are you aware of any successful initiatives of the EY2012 that will be repeated or continued in 2013 and beyond in your country?**

Options	Total	Percentage
No	48	63
Yes	28	37
<b>Total</b>	<b>76</b>	<b>100</b>

Source: National Stakeholders Survey.

Besides the continuation of the specific initiatives of the Year, in section 4.2 we have mentioned a number of policy initiatives and partnerships that ensure the consolidation and persistence of the EY2012 results. The level of mobilisation of actors provides another indication of likely sustainability. Moreover, as the Year did not rely on an EU dedicated budget at country level, no initiative is strictly financially dependent on the EY2012. The EY2012 has mobilised public, private and non-profit entities endowed with mobilisation power and resources to fund the activities. In addition, the guidelines about the use of EU funds disseminated by the Commission and the Social Investment package policy framework should make available additional resources. Moreover, as already mentioned, the Commission has made available grants for the design of comprehensive national strategies on active ageing.

However, it cannot be disregarded that several countries are addressing the financial and economic crisis and encounter severe fiscal consolidation challenges. Some countries have very high youth unemployment rates and are addressing this issue as a priority. The intergenerational message of the Year is very relevant in this context, but in terms of funding of structured policies this may not be sufficient to keep active ageing high on the policy agenda. This should affect however only the employment policy area. In the health and independent living field, as well as in the wider participation field, the topicality of the issues and the existence of civil society, academic and business actors willing to identify and spread innovative approaches and solutions represent a long-term trend that is less likely affected by contingent socioeconomic circumstances.

## 8 Conclusions

In this section, we set out the conclusions of the evaluation. To do so, we first provide the key findings related to each of the evaluation questions. Then, we make a number of overall remarks based on a transversal reading of the evaluation results.

### 8.1 Findings on the evaluation questions

#### Relevance

EQ1 - How relevant was the initiative to organise a specific European Year for the promotion of active ageing and solidarity between generations?

EQ2 - How relevant were the EY2012's objectives, thematic priorities and types of initiatives?

The **choice of promoting an European Year on Active Ageing** and Intergenerational solidarity was highly relevant. The relevance of the EY2012 is rooted in the following:

The relevance of the EY2012 is therefore rooted in the following:

- Long-standing identification of the scale and importance of the issue (from at least 2007);
- The high degree of relevance to Member States, all dealing with similar problems (albeit in different contexts);
- The multi-faceted nature of the issue, covering a wide range of economic, technical and social issues;
- The need to link challenges and opportunities and highlight benefits, not just negative aspects.

The choice of the **thematic priorities** – employment, health and independent living, participation, intergenerational solidarity – was consistent with prior thematic analyses and policy activity conducted on active ageing at EU level and internationally.

The relevance of the **objectives** chosen for the EY2012<sup>79</sup> was generally uncontroversial, these objectives mirror the needs and policy priorities already agreed by Member States and set out in the various preceding policy documents. The objectives also recall those of the previous Years (EY2010 for example) and reflect the limitations on the EU's leverage, for example given that the Commission only has the power to 'coordinate' on social issues.

The evidence indicates that the **types of activities** undertaken were appropriate to the needs of Member States and EU citizens. National Coordinators and stakeholders were able to choose and tailor initiatives to their own contexts and priorities, with support from the communication contractor.

#### Effectiveness and impact

EQ3A - To what extent did the EY2012 deliver the expected results?

EQ4 - Which target groups were reached best? At which level?

EQ5 - What were the main impacts of the EY2012?

EQ 6 - How and to which extent did major European events contribute to achieving the EY2012s objectives?

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<sup>79</sup> With reference to the logic model above the specific objectives were aimed at raising general awareness, creating a framework (for commitment and action), and stimulating debate and exchange of information.

Based on the information collected from National Coordinators, the plans made in the National Programmes were respected “to a large extent” in a vast majority of countries. The only exceptions were France, Finland and UK, which stated that the programme was delivered to some extent, and Malta, which did so to a limited extent. Furthermore, all the types of outputs considered in the intervention logic were produced in at least half of the participating countries. The outputs linked to communication and awareness raising (information campaigns, training and awareness-raising seminars, conference and events) were the most often delivered; two thirds of respondents also mentioned knowledge outputs like mutual learning seminars, reports, surveys; a similar share reported the delivery of outputs formalising policy commitments.

In our view the **specific objectives**<sup>80</sup> are to be considered partly achieved, if we consider the feedback from national stakeholders besides the response of National Coordinators. Of these, awareness raising is considered to have achieved the best results, mostly awareness-raising of relevant organisations and civil society groups (as opposed to individuals) through EU-level and national initiatives and events.

The Year achieved its **intermediate objectives** of strengthening existing networks, creating synergies and partnerships between government levels and policy areas, promoting policies and long-term strategies and making available technological, organisational and social innovations. The objective of establishing new networks was rarely achieved. The development of national policies, strategies and comprehensive programmes on active ageing in a number of countries (AT, BE, BG, CZ, DE, EE, ES, FR, LT, MT, PL, RO, SE, SI, SK) provides evidence of the policy impact of the Year.

Overall, the Year succeeded in its ultimate goal of **mobilising relevant actors** around active ageing and intergenerational solidarity.

In terms of outreach to **different target groups**, the main achievement appears to be the mobilisation of civil society organisations. The involvement of regional and local governments was also significant, but did not happen in all countries - the dynamism and visibility of National Coordinators to local governments may have made the difference here. The involvement of social partners was variable - as is the landscape of social partner organisations and the tradition of industrial relations in Member States -, and the majority of National Coordinators considered that private businesses were not reached to any great extent (even though they appear as promoters of a moderate share of the initiatives included in the EY2012 database - 73 in total). Regarding outreach to the general public via the media, the picture is mixed, with countries equally divided between those that claim to have succeeded to a large or very large extent, and those that consider success as partial or limited. Limited success was sometimes attributed to lack of the level of funding required for a sustained communication campaign.

Overall, the various **EU level events made a strong contribution** to the achievement of the goals of the EY2012. The strongest contribution was from the opening event in Copenhagen, the Generations@school initiative and award and the EU awards for social entrepreneurs, journalists, age-friendly environments. The Seniorforce Day did not realise its full potential, as a result of the late approval of the Decision and the related contractual delays, and had to revert to a series of smaller, national events, which lessened its impact. Two of the awards (Age-friendly workplaces

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<sup>80</sup> The awareness of policy makers of all levels, civil society, social partners and the business community has been raised, debate has been stimulated, information has been exchanged among policy-makers and stakeholders, mutual learning has been developed, and a framework has been offered to policy-makers and stakeholders to make public commitments and to take concrete action.

and Life-story challenge) would have required more time for preparation and stakeholders mobilisation and were not as successful as they could be because of the delayed implementation schedule. The Journalists' conference was also affected by implementation difficulties, and although organised at short notice nevertheless had an impact. The EU website was widely appreciated as a cost-effective initiative, but the number of unique visitors was comparatively lower than for other Years (although we could not ascertain whether this was compensated by more visits to national websites). The degree of engagement with social media on the part of participants and stakeholders also appeared limited, at least at the EU level.

### Complementarity

EQ7 - How complementary was the EY2012 with regard to other EU policies or policies in the Member States in the context of active ageing and solidarity between generations?

At **EU level**, there was strong complementarity between the Year and other on-going policy activities. In DG EMPL the EY2012 was complementary to the White Paper on Pensions and the Demographic Forum. Externally to DG EMPL, the Year had the strongest complementarity with the activities of DG SANCO (via its 2<sup>nd</sup> Health Programme and especially the European Innovation Partnership on Active and Healthy Ageing), DG JUST (via the planned Accessibility Act, a legislative initiative to ensure that goods and services are accessible to people with impairments); and DG CONNECT (e.g. European Innovation Partnership on Active and Healthy Ageing). There was also interaction with DG EAC (high-level conference on adult education) and DG RTD (specific call for proposals). The consultation evidence suggests that the Inter-service Group established to facilitate collaboration between DGs worked well.

The evaluation found multiple instances where the EY2012 was clearly complementary to policies implemented in **Member States**. The EY2012 helped refining the national policy agendas on active ageing and stimulated the exchange of good practices between countries. The **EU added value** of the Year is demonstrated by the evidence of volume, process, scope, agenda setting, innovation and learning effects. The EY2012 increased the number of initiatives for promoting active ageing in the Member States and strengthened the knowledge and skills of stakeholders involved in the organisation of the Year. Furthermore, the EY2012 offered organisations and individuals from different Member States the opportunity to become involved in national activities of another country. In countries with an existing national agenda on active ageing and intergenerational solidarity, the EY2012 strengthened the level of policy commitment and brought added value by introducing and disseminating innovations. The scope of active ageing policies was broadened in a large number of participating countries through the inclusion of new topics and a more holistic approach to active ageing and intergenerational solidarity. Whereas the issue of active ageing was previously mainly confined to health policies and/or employment policies, the issue is now addressed via multiple policy areas.

### Efficiency

EQ8 - Was the EY2012 implemented efficiently or could better results have been achieved with the available resources (human and financial) at the EU level?

In terms of the budget, the EY2012 falls within the lower end of the range of European Years, second only to the least funded Year in the series 2009-2012 (EY2009, which had no specific budget). Nonetheless the evidence suggests that a great deal was achieved by the EY2012, to some extent mirroring the findings of the EY2009 evaluation (i.e. that existing and non-EU resources can be mobilised effectively and outcomes and impacts are not necessarily proportional to direct levels of spending). It may therefore be argued that (at least) **comparable results were achieved using fewer resources than in other European Years**.

### Gender and social inclusion mainstreaming

EQ9 - How and to what extent was the gender dimension taken into account in initiatives, at EU and national level?

EQ10 - How and to which extent was the accessibility of the activities ensured for persons with disabilities?

**Gender mainstreaming** was considered from the start of the EY2012 and included in the activities promoted by the Stakeholders Coalition and several Member States. Gender-focused members of the Stakeholders' Coalition played an important role in this regard, although the gender approach as applied in practice focussed almost always on women's and not also men's specific needs. In general, the EY2012 was led predominantly by women and the main national events attracted and included women more often than men.

The EY2012 covered a wide range of issues that elderly people face related to **disability**, especially health and independent living. Both at EU and MS level, the initiatives addressed disability directly and indirectly. The activities of the EY2012 by and large ensured the **accessibility** of the built environment at events and provided facilitations such as sign language interpreters and transportation at various occasions. The EU website contained options for larger fonts.

### Implementation and delivery mechanisms

EQ 11 - How relevant and effective were the management structures and delivery mechanisms at EU and national levels? Could alternatives be envisaged?

EQ 12 - How, and how effectively, have relevant stakeholders (regional, national authorities and NGOs and social partners) been involved (at the EU and national levels)?

**Management structures and tools employed at EU level** were appropriate and functioned satisfactorily. Working relationships between the EC, NCs, EC Representations, stakeholder groups and the communication contractor were strong and a high degree of collaboration and cooperation was achieved, which served to increase the effectiveness of the Year. The available data suggests that mechanisms at **national level** were also largely effective.

In terms of process, **timing** emerged as a significant issue: the EY2012 was relatively late in gaining final approval, although fortunately some valuable preparation activity had been carried out well in advance of the Year (even before 2011) and some key mechanisms were already in place (e.g. the Stakeholders' Coalition, meetings of National Coordinators). The timetable did however present some difficulties and this led to significant impacts, notably contracting delays resulting in the lost opportunity to deliver the Seniorforce Day initiative at EU level and link it to the awards, and the compressed timeframe available to organise the Journalists' conference.

At EU level, **the involvement of stakeholders** was well organised, based on a partnership approach and highly valued by those concerned. An inclusive, open and joint approach paid dividends in terms of informing the development and delivery of the Year; and stimulating continuing partnerships and networks in future. There is ample evidence that stakeholders were very satisfied with the coordination provided by the EC team.

At national level, a range of stakeholders participated, as shown by the analysis of the initiatives in the EY2012 database: this included strong involvement of NGOs, national authorities (other than NCs), regional and local authorities and EC Representations. Social partners and private sector companies were also represented. This evidence suggests delivery mechanisms were able to involve a cross-section of appropriate stakeholders at national level; and facilitate the engagement

of a range of regional organisations as well. The fact that almost all countries had some form of national stakeholder committee or coalition is likely to have played a role in achieving the result.

### Sustainability

EQ 13 - To which extent is the EY2012 likely to provide a lasting effect?

EQ 14 - Which type and area of initiatives, delivery mechanisms and stakeholders involvement were particularly successful in providing lasting effects?

At **EU level**, there are some grounds to support the sustainability of the agenda-setting effects of the EY2012 in the various on-going and follow-up activities.

The Social Investment Package Communication produced by DG EMPL has kept the intergenerational approach alive. In fact, under the heading Social Investment throughout the individual's life the Commission urges Member States to implement the recommendations on Investing in Children and Policies to Reduce Early School Leaving, and to use the Guiding Principles for Active Ageing and Solidarity between Generations and the Active Ageing Index. The Social Investment Package is important because it also guides the use of the European Social Fund that is a major resource pool for the implementation of social policies. Furthermore, a report on long-term care was published in 2013 with clear connections to the knowledge developed during the Year<sup>81</sup>. Moreover, DG EMPL is awarding grants to Member States authorities to develop comprehensive strategies on active ageing<sup>82</sup>.

DG SANCO and DG CONNECT have continued to work with a large number of scientific partners and stakeholders on the EIP-AHA, the other important legacy initiative of the Year. Although mostly focused on health and independent living, the EIP-AHA has kept a link with broader social and environmental policies in its component on innovation for age-friendly buildings, cities and environments, which is led by AGE Europe. The European Commission and WHO are working together to produce a version tailored to Europe of the guidelines for age-friendly cities published by the international organisation. In summer, a brochure has been produced with good practice examples of innovation<sup>83</sup>.

Other DGs have followed up on specific aspects of active ageing, for instance DG JUST via its European Network of Experts on Gender Equality has published a study on gender gap in pensions<sup>84</sup>.

Based on the information collected **in the participating countries**, there are indications that the effects of the EY2012 are lasting beyond the Year itself and at least some of them will be sustained over a longer time period. A large majority of National Coordinators confirmed that at least some of the activities undertaken during the Year lasted beyond 2012 and 11 countries report that this is the case for at least half of the activities. Moreover, in certain countries comprehensive strategies and plans were adopted, while in other ones there were outputs at the level of concept papers, charters, pieces of legislation covering specific issues, or projects.

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<sup>81</sup> OECD Health Policy Studies A Good Life in Old Age? Monitoring and improving quality in long-term care, OECD/European Union, 2013.

<sup>82</sup> Call for Proposals VP/2013/009.

<sup>83</sup> European Innovation Partnership on Active and Healthy Ageing Excellent innovation for ageing A European Guide, <http://ec.europa.eu/digital-agenda/en/newsroom/all/brochure>.

<sup>84</sup> [http://ec.europa.eu/justice/gender-equality/files/documents/130530\\_pensions\\_en.pdf](http://ec.europa.eu/justice/gender-equality/files/documents/130530_pensions_en.pdf).

## 8.2 Overall remarks

The Year was organised around a **"mature" theme**, in the sense that the conditions that existed included the following key characteristics:

- Long-standing portfolio of policies and a strong evidence base supporting the importance of the issues involved;
- Strong pre-existing stakeholder constituency;
- Strong and increasingly integrated series of EU measures and activities (across several Commission DGs).

As a consequence:

- the Year was clearly relevant to urgent needs at EU and MS level. There was a consensus on the value of highlighting the benefits of a 'joined-up' approach and testing ways to exploit the potential synergies that emerge from increased understanding.
- Although some of these factors made the additionality of initiatives and activities less evident, the Year nevertheless provided significant added value in terms of strengthening complementarity and partnership across policy areas and governance levels.

Content-wise, the EY2012 helped promote the dissemination of a **holistic approach to active ageing**, and the shift from a narrow employment-related or health-related focus to a more comprehensive understanding. Gender and disability issues were part of this broad approach. The **intergenerational focus** added further value and link to topical issues.

In this context the Year was characterised by a **high level of participation** (which also emerged as a key theme) and **strong mobilisation of actors**, principally but not limited to civil society. There were clear links with the previous (volunteering) and current (citizenship) European Year's themes and similar continuities could be exploited more systematically in the future.

The **regional and local dimensions** were strong and this gives food for thought for the future set up of European Years, as a strict focus on National Programmes might overlook this reality.

The degree of **outreach to the general public** was limited, but this has also been the case in other Years with a larger, dedicated budget; and the **choice of focusing awareness-raising on stakeholders** proved a good value-for-money choice.

The fact that stakeholders were mobilised is proven by the **many concrete policy outcomes** and signs of lasting effects that the Year has left behind.

In terms of operations and delivery mechanisms, the set up worked well, with **cooperation among all the parties involved**. As a result almost all of the outputs were delivered. The timing was an issue however, with delays in the approval of the Decision impacting on implementation.

The fact that there was no EU specific funding for **country budgets** (through grants, as in some previous EYs) besides obvious constraints also had advantages in terms of removing inevitable tensions revolving around administrative burden and competition for funding; and did not prevent participation and high levels of activity. This was also possible because, as highlighted above, the Year covered a "mature" field, where a great deal of activity was already in place in Member States.











## 9 Recommendations

In this section we propose a number of recommendations based on the lessons learnt in the EY2012. This addresses the final evaluation question:

EQ 15 - What recommendations can be drawn with regard to 1) active ageing measures and actions and 2) future European Years?

### 9.1 Suggestions for further actions to support active ageing

Formulating recommendations on active ageing policies was not the purpose of this evaluation, which would require a much broader assessment of relevant policy activities in Member States and at the EU level. This section therefore only highlights some initiatives from the Year which policy makers may find of interest.

#### 9.1.1 *Involving universities of the third age and other stakeholders in long-term programming*

Participation was a key aspect of the Year and a large number of civil society organisations showed interest and commitment, focusing on stakeholders' paid dividends. Not to disperse this potential, national, regional and local governments could establish and strengthen participation fora for senior citizens and support senior-led initiatives for active ageing. One way to do this is to involve lifelong learning movements, for example universities of the third age, and help them to have a leading role in the promotion of active ageing strategies more generally – as, for example what was achieved in Poland or Portugal.

In **Poland**, the Universities of the Third Age (UTAs) represent a well-established movement. Around the same time in which the Commission decided that the EY2012 should focus on Active Ageing and intergenerational solidarity, the Polish Parliament independently decided that 2012 should become a year dedicated to the UTAs. To optimise the involvement of this network while at the same time broadening the scope of the Year, the budget originally assigned to the year of UTAs was redirected to the EY2012 of active ageing; this was also the result of lobbying by NGOs but was well accepted by UTAs as well, because they saw in the Year their priorities, activities and concerns reflected. In fact, the main priorities of the EY2012 as set by the Commission were largely adapted in the National Action Plan in order to reflect UTAs and other stakeholders' focus on education. This also reflected country needs, because many elderly Polish citizens are lowly educated and this hampers employment prospects and integration into society. At the same time, additional themes were added to education, and in this way other stakeholders than UTAs could be engaged. A Council for Senior Issues was established whereby NGOs and other stakeholders were engaged in developing the Programme on social activity for the elderly 2014-2020. This increased the motivation of UTAs and stakeholders to participate in the Year, because the Year was not seen as an isolated initiative but the start of a long-term concerted effort of government and civil society to promote active ageing. The Programme includes actions related to four priorities: education (formal and informal, including through participation in volunteering); social activity for social integration (e.g. through libraries and community centres); participation (e.g. local senior citizens councils); social services.

**Portugal** provides a different example of how the already established UTA movement was effectively involved to create a strong mobilisation for the European Year, in this case without specific funding to its activities. In Portugal the universities of Third Age are organised in the RUTIS association. RUTIS was called to participate in the EY2012 stakeholders coalition since the preparation of the Year. At the same time, they developed their own programme for the EY2012, including in part already planned activities in

part specific activities. During the EY2012, RUTIS mobilised 138 UTAs and 42 partners involving about 4200 senior citizens<sup>85</sup>. Senior theatre and music festivals and other cultural initiatives were organised. RUTIS concluded with an exchange event in 2012 the national activity of an EU project called Cultural Bridges, funded under the Grundtvig Programme. During the Year, RUTIS also had a project approved for the establishment of an active ageing centre in its premises, funded by the PRODER rural development programme (co-financed by the European Agricultural Fund for Rural Development). The EY2012 national coordinator participated in the annual meeting of RUTIS affiliated universities with a presentation aimed at raising discussions on active ageing. RUTIS produced an own publication, "Ideas for Active Ageing", as their own contribution to the national debate on active ageing.

### 9.1.2 *Establishing local senior citizens councils to promote the participation of the elderly*

Local senior citizen councils do exist already in certain countries working as an intermediary between the City Council and the elder population of the particular municipality. In Denmark for example, participation institutions have been in existence for several years and City Councils are obliged to consult with its Senior Citizens' Council before any final decision is reached on matters affecting the elderly<sup>86</sup>. EY2012 helped in making this type of participation initiative known to a wider public, establishing it where it did not exist before. Such local fora may be useful to make sure that active ageing initiatives are planned "with" and not just "on" the elderly. The work of these councils needs to be given actual powers, or at least a say, on practical matters.

**In Denmark**, during the EY2012 the Danish National Association of Senior Citizens' Councils (NASCC) took action to promote work for local democracy across generations. NASCC celebrated two national conferences, on "Active Ageing and municipal services" (May) and one on "Local democracy across generations". Both conferences included a mix of presentations and workshops.

**In Portugal**, new local senior councils were established under the impulse of the Year. This happened for instance in the municipality of Santa Maria da Feira with the *Fórum Sénior Municipal*<sup>87</sup>. The Forum was established through an invitation to individual senior citizens of the municipality, also channelled through organisations working in the social domain. 31 members were recruited. The Forum provides advice on the concrete organisation of social activities for the third age in the municipalities, e.g. educational trips. The Forum also conveyed the point of view of senior citizens in the implementation of the Year, e.g. making it clear that seniors are already very active and deliver a lot of work in support of their families and communities.

### 9.1.3 *Supporting intergenerational activities*

The theme of intergenerational solidarity was well received and brought added value to the thematic framework of the Year. The experience of the Generations@school initiative showed that there was pre-existing interest in participants and the Year acted as a catalyst, whilst providing practical tools, guidance and publicity (in particular the opportunity to enter a competition). The initiatives organised in schools demonstrated that senior citizens can share knowledge and experience with the younger generation. This is important to bring a shift in public perception from considering the elderly as a problem to considering them as a resource. The initiative also promoted the concept that active ageing and youth empowerment can go hand in hand and do not represent conflicting policy priorities. Even without an EU framework, national and local governments, and civil society organisations could consider organising similar initiatives again (e.g. a Generations@school day), adapting the format to meet their own needs and available resources. Whenever appropriate, they could use the contacts established during the European Year to

<sup>85</sup> *Relatorio de actividades da RUTIS*, 2012.

<sup>86</sup> <http://europa.eu/ey2012/ey2012main.jsp?catId=975&langId=en&mode=initDetail&initiativId=91&initLangId=en>

<sup>87</sup> <http://emilia.inescporto.pt/news/forum-senior-municipal>

network with similar initiatives in countries (via web platforms, if funding for exchange visits is not available). Local implementation and the international framework have, in fact, both been key success factors of Generations@school in the EY2012.

#### 9.1.4 *Providing a framework for commitment to active ageing*

At the beginning of the Year, the EC team endeavoured to elicit policy commitments towards active ageing that could be recorded in a publicly accessible EU database (the database of the EY2012). This exercise yielded a limited number of commitments, showing that a technical platform is not sufficient for obtaining this type of engagement. An earlier and more careful preparation with key partners would have probably increased the chances of success. Obtaining a policy commitment from a national, regional and local government requires the time to consult the relevant stakeholders and ensure high-level support. Even if the commitment is part of already existing policy plans, there must be clarity about the added value and importance of sharing it in a transnational platform. A network where policy-makers play a leading role and get recognition can be useful to reinforce their sense of “ownership” towards such a platform. For local authorities, the Commission could work towards the proposed Covenant of Mayors on Demographic Change or a similar instrument, in cooperation with the Committee of Regions and the relevant EU networks.

## 9.2 Lessons for future European Years

### 9.2.1 *Preparation*

The evaluation revealed the importance of choosing a “mature” theme for the success of a European Year. Active ageing was clearly such a theme. It is important to improve and fine-tune the **process leading to the decision of the Year’s theme**, to ensure that this is always the case. To achieve this, the EC could take the following steps.

- **Formalise clear mechanisms for selecting the theme of the Year**, with well-defined procedures, objectives and responsibilities for the management of a transparent, centralised, multi-annual process. This should include the setting out of the core criteria and characteristics that describe a ‘good’ theme for a European Year (based on the maturity of the policy theme aspect identified in this evaluation for example).
- **Consider ways in which the Year and associated decision-making processes and design and delivery procedures might be formalised and professionalized**, for example through standing guidance and centralised coordination by a single DG (DG COMM) or the Secretariat General, and by including a strong role for the European Parliament, The European Economic and Social Council, the Committee of Regions and the EU Representations in Member States;
- **Carry out a robust and systematic ex-ante assessment of the Year**, also including some form of empirical research/mapping of actors that are interested in the proposed theme and can potentially mobilise resources. The EY2012 was preceded by an extensive consultation where respondents were also asked about their potential contribution to the EY and that paved the way for their subsequent mobilisation. This could be repeated and strengthened for instance by opening a consultation on competing potential EY2012 themes, where interested stakeholders could propose in advance their commitment by responding to a structured questionnaire. EC representations and relevant EU policy committees should be involved in this process as well.
- Consider choosing the theme in such a way that it is possible to exploit connections with **the preceding and subsequent Years**. In the case of the EY2012, there was the advantage of working with overlapping groups of stakeholders. Moreover, the national teams were sometimes very close to those who had implemented the EY2011 and this facilitated the transmission of lessons. With thematic continuity, it is also possible to have the subsequent Year launched at the final event of the current Year in the presence of a relevant audience. Of

course the search for continuity should not be to the detriment of the relevance of the theme and should not restrain from choosing innovative and least explored themes. In any case, the ex ante assessment could investigate if and how continuity with the previous and following Year can be exploited at EU and country level.

The evaluation also highlighted that a smooth and timely decision-making process is key. Certain initiatives lost momentum due to the belated **decision** approval. Also, certain EU level networks could have conveyed the message more systematically to their membership with an earlier decision. Drawing on these lessons, the EC, in agreement with the European Parliament, could take the following steps.

- **Commit to the EY process well ahead of time**, to allow for effective engagement of Members of Parliament, regional and local stakeholders and early establishment of the website.
- **Aim for the timely approval of the decision** (ideally one year in advance), or if this is difficult to achieve, prevent the impact of the late publication of the decision of implementation, especially in terms of contracting matters.
- **Consider outsourcing communication services under a main framework contract** for a multiple number of European Years. Having a contractor specialised in EYs allows experience and knowledge to be built on typical formats of activity of the European Years, lessons to be learnt and the establishment of a cooperation network with EC representations in Member States.

**Ensure that cooperation is established among relevant services early enough** to allow spending programmes, and notably calls for proposals, which take into account the theme of the EY. In the EY2012 for example, early cooperation allowed the inclusion of a reference to active ageing in the call for proposals published under the Social Dialogue budget line. To have relevant projects implemented during the European Year, cooperation needs to be established two years in advance (so that calls for proposals can be launched one year in advance). This means that ideally the theme of the Year would also need to be known two years in advance.

### 9.2.2 *Set up and implementation*

The **collaboration between EC team and National Coordinators** was smooth during this Year and the mechanisms set up for this cooperation represent a good practice example. The qualities and level of commitment of National Coordinators were also crucial and made a difference in the attainment of certain target groups in some countries. At the same time, the Year also had a strong regional dimension. In setting up the governance structure and programme for the Year, the EY team, in agreement with participating countries, could take the following actions:

- **Create a stimulating mutual learning environment among National Coordinators** and between coordinators and Stakeholders, through periodic face-to-face meetings and regular communication in between meetings. The evaluation showed that regular face-to-face meetings of national coordinators with the EC team and communication contractor allows less experienced country officers to learn from the most experienced ones and facilitates cooperation at country level. Moreover, convening joint meetings of National Coordinators and EU stakeholders improves the coordinated cooperation between governments and civil society at country level.
- **Provide the option of developing regional programmes** where for any reason a National Programme cannot be developed, and sensitise the Committee of Regions and organisations of regional and local authorities in time, so that they have time to mobilise their members.
- **Encourage participating countries to pay particular attention to the personal qualities and skills of National Coordinators** – leadership, being known by stakeholders and having contacts across a range of relevant policy departments.



The choice of initiatives at EU level proved adequate in general, but the EU Awards did not all have the same rate of success. To maximise the impact of the Year, the EC could in future Years:

- **ensure strong partnerships are secured on EU awards well in advance**, and exploit key intermediaries and existing dissemination channels, recognising that this requires planning well ahead of time;
- learn from the success of Generations@school, and **prioritise activities with local implementation and impact, but with a transnational dimension** (e.g. award, exchange visit, etc.); activities that are similar to what has already been done but in which the EU context adds some clear added value to participants.

The website was a powerful instrument for the Year, but the evaluation highlighted the need for better data on website access and more effective links between the EU level and national level management of websites and social media accounts. Also, the communication contractor appeared to have responsibility for the input/contents of the website but not really for the final outcomes of web and social media activity (that was run by the EC). In this respect, for the next Years the EC could:

- **make sure that the communication contractor also has targets related to the outreach of web and social media activities**, not only at EU level but also at country level if possible, via national correspondents providing technical assistance to National Coordinators (this was done in this Year for traditional media activity, could be extended in scope); a communication contractor with national correspondents could also keep a better overview of the overall social media impact of the Year;
- **improve ongoing monitoring of the outreach to the general public through the website**, by collecting more detailed website statistics (e.g. collect data on the country of origin of visitors via IP addresses; consider asking to register for the download of important materials or publications; etc.).

EY2012 demonstrated that it is possible to achieve good results without allocating a specific **budget** to Member States. In the next EYs, the EC could continue the approach of not providing separate grant funding for projects in Member States during the Year, advise on the use of existing funding instruments to support the theme of the Year, and provide assistance through the communication contractor and EC representations. The choice of providing grant funding only *after* the end of the Year, to develop comprehensive strategies on active ageing using the momentum created by the Year, represents an interesting choice to the Commission for the EY2012 that could be replicated.

### 9.2.3 Follow-up

The follow-up of a European Year is important to ensure lasting effects. A specific **legacy strategy** should be designed by the responsible DG preferably at the beginning, but at the latest before the end of the Year, to ensure that the built momentum be supported and accommodated by appropriate EU programmes and policy initiatives.



## Annex I – Case studies



# Generations@school

## Introduction and purpose

The objective of the case study was to provide a detailed understanding of the response and outcome of an EU-level activity at national and local ('grass-roots') level, to help identify key success factors and lessons useful for future rolling out in European Years. We choose Generations@school among the various EU-level activities because it was a format that was specifically introduced in the EY2012, and provided for a strong linkage between the national/local and EU levels.

The focus of our investigation was on:

- Initial awareness and preparation in the context of each school/project;
- Appeal of the topic and mobilisation of key actors in the process as an indication of relevance depth and richness of the experience of those involved as an indication of effectiveness;
- Links to wider policies and initiatives in the same locality (context) as an indication of complementarity;
- Lessons to be learned.

The starting point for this component of the evaluation was to explore further the extent to which the evidence supported the following hypotheses:

- The topic of solidarity between generations has wide appeal, especially in a school education setting and where strengthening links with local communities is on the agenda;
- The initiative provides a relevant framework but also allows sufficient flexibility for tailoring to local interests, needs and resources;
- Mobilisation is relatively straightforward and cost-effective to achieve;
- Guidance provided (e.g. on the website) lowers barriers to participation;
- The activity can be repeated as many times as needed and in subsequent years (sustainability).

## Background information

The Generations@school initiative provided guidance and resources on how to organise and deliver project-based activity focusing on the theme of inter-generational solidarity. Participants registered and created an account on the initiative's website, could then upload photos of their activity and be entered in the competition to win a digital camera or trip to Brussels for the class. It was suggested to participants to hold the activity around the European Day of Solidarity between Generations. The information on the website described the aim of the activity as follows:

"We are looking for intergenerational projects that are creative and that have a clear impact on all the people involved, young and old. A successful event will be one with lots of conversation, learning and laughing, where together younger and older people may even find innovative ideas on creating stronger links between the generations. The best projects are often the ones that are easy to implement and inspiring for others!"

Some 420 school participated in the Generations@school initiative. The information available indicates that each school involved a minimum of one class (say an average of about 30 pupils), several teaching staff plus 10-15 older people. This assumption allows us to calculate the total minimum number of participants at about 18 900 (420 multiplied by 45).

There were also a series of 26 VIP events organised in primary and secondary schools<sup>88</sup> in 26 Member States with well-known personalities including: actors, artists, poets, authors and musicians, EY Ambassadors (Slovakia, Estonia, Latvia, Slovenia and Finland), local/regional/national politicians and EC Representations (Slovakia, Belgium, France and Spain). Most also included the involvement of the National Co-ordinator and 14 the national Ministry of Education. In Ireland the Prime Minister, Enda Kenny, attended.

## Methodology

Telephone interviews were conducted with representatives of nine schools that had participated in Generations@School. These were located in Austria, Bulgaria, France, Ireland, Italy, Poland and Portugal. In addition we were able to draw upon case studies on the winners of the 2013 Generations@school awards (Bulgaria, Greece and Poland).

## Results

### Motivation for involvement

**There was no single route through which schools learned about the initiative.** Rather, a range of active and passive channels led to participation. Awareness came through eTwinning (Portugal), through colleagues from other schools (Italy), via an invitation from the local school authority (Austria), information received by the school administration (Poland); and also through self-directed research (France and Poland). The results also highlight the key importance of a small number of prime movers or champions driving the individual projects forward. These champions include head teachers, individual and groups of teachers and the wider school community (e.g. families, student councils and school clubs). Overall the evidence supports the **central role of highly motivated individuals**.

There is little evidence of widespread awareness of the European Year itself, including at the institutional level. Instead the evidence indicates that **most participating schools already had a propensity to become involved**, through previous experience, a pre-existing high level of interest in the subject area (inter-generational solidarity or the European dimension) and the opportunity (schools in Austria and Ireland mentioned the proximity of the school to a nursing home, and this was also a focus of activity in the Polish and French schools examined). This suggests that Generations@school provided an opportunity and catalyst for schools already pre-disposed to activity in this field to put aspirations and plans into action.

Motivations were largely linked to **sharing knowledge**, in particular in terms of the life experiences of older people and promoting greater mutual understanding and respect between the generations. In many cases the impetus originated in teachers' own personal and professional interest (for example in one of the schools in Poland one of the teachers is involved in the University of the Third Age and in the example from France the project clearly originated with one teacher who had a long-standing interest in inter-generational activity and was looking for a suitable opportunity). For some (as was the case for the Austrian school) it was also a motivation to raise awareness of their activities more widely. In several cases there was an explicit aim to explore local history and culture; and to promote integration of the school with the wider community (Poland). However there are also examples where the focus was more specific (in the Italian case the main objective was to

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<sup>88</sup> In Slovakia, nine schools in different regions.

teach French language, but using the experiences of grandparents in Italy and France via video-conferencing), or based around a European theme (Bulgaria).

### Key stakeholders

Activities were initiated, designed and delivered by a variety of **head teachers, teachers, students and others**. On the whole the **involvement of local authorities and school management was limited** and most activity appears bottom-up in character. Nevertheless school authorities were generally supportive and provided physical space, publicity on school websites and other players such as a city mayor and local authorities also provided help and support (Austria, Bulgaria). Students often carried out preparatory research and were heavily involved in developing activities (e.g. in Portugal, Italy, Bulgaria). In other instances student councils worked closely with teachers on planning the activities (Bulgaria). Participation was usually voluntary and spontaneous. There were several instances of a trans-national dimension: the Italian example involved classes in Italy and France.

It was quite common to work with **care homes and less formal senior citizens' organisations** (e.g. clubs) to provide the basis for exchanges and interactions between generations. For example in Austria and Ireland the school set up raised planters in the grounds of the local nursing home, providing an opportunity for children to spend time with the elderly residents growing vegetables. For the school in France, securing the cooperation of the Director of the retirement home that was involved was an important success factor – this meant that recruiting participants was quite easy. In the Irish example pupils visited a neighbouring nursing home to read to residents. It was common to draw on the experiences of pupils' own grandparents as a way to foster interaction. In Poland children visited a parish senior club to present poems and songs, about their parents and grandparents.

The evidence from the cases suggests that **financial inputs were limited**, with small contributions from schools' own funds and local authorities, but with a significant component of in-kind support (including use of facilities, donations etc.). In most cases the project promoters assumed that limited funding would be available and so had few expectations in this respect.

### Project activity

**Austria (Naturparkschule NMS Neuhaus am Klausenbach):** The school set up a raised bed in the grounds of the nearby nursing home. Pupils then visited the garden, to speak to and spend time with the elderly, who either took part in or watched the gardening activities. Visits were then discussed afterwards in the classroom. About five visits took place during spring. The aspiration was to raise awareness of the school's activities and teachers with relevant subject knowledge were involved (e.g. natural sciences). The head teacher was heavily involved and the town's mayor was supportive.

**Bulgaria 2012 ("Dimitar Blagoev" School):** The aim of the activity was for young and old to get to know each other better, to find out about childhood, adolescence and the professional experiences of the senior participants (including former teachers); and to compare the lives of the young and old. The student council worked together with teachers to develop the project and invitations were sent to former teachers. Participants themselves prepared a significant proportion of the materials used. Meetings were held in the classroom in April 2012 and discussions staged about the significance of the connection between the generations; what they can do together; how the elderly and children live nowadays; what are the difficulties they face in their day-to-day lives and why the young and old need to respect and help each other. The guidance materials and tools on the website [Generations@school](#) proved very useful. The school provided photographers and

organised TV news and newspaper articles about the event. The local authority (Svishtov municipality) was kept informed about the initiative and welcomed the idea.

**Bulgaria 2013 ("Dimitar Blagoev" School):** Pupils from two classes volunteered to organise a sports competition "*Let's play together*" with their parents and grandparents, encompassing three generations. The aim was to show that they could compete together and win. The school provided: the prizes (in cooperation with the European documentary centre in Veliko Tarnovo); the venue for the competition; music; invitations; media presence; and transport. The event was held on EU Day of Solidarity between Generations (29 April 2013)<sup>89</sup>.

**France (Ecole Sainte Anne, Le Havre):** There were two types of activity comprising meetings every fortnight together with a number of "special events". These allowed children to present day-to-day activities and projects carried out in the school ("children present their work"). Examples of activity include: children staged a play at the retirement home; a children's choir gave a concert at the home; carnival day ("*mi-carême*"); invite the old people at the annual "*kermesse*" at school; elderly people also came to the school; regular meetings at the retirement home also had themes such as "how school was before"; and the children and elderly also played games. The children were very enthusiastic to meet elderly people and vice-versa. The human relationship aspect and sharing stories worked particularly well.

**Ireland (Beneavin College, Dublin):** This boy's school based in a deprived area of north Dublin and the reason for their participation in inter-generational work was to improve student wellbeing. There is a nursing home next to the school and the first step was to work with the activities coordinator based there to decide what sort of joint cooperation was possible. A reading project was chosen since it was thought that this would benefit all parts of the community. Using tablet computers the pupils read to the residents, discussed the book with them, and then wrote a book review in the form of a blog on the website [www.elearningatbeneavin.com](http://www.elearningatbeneavin.com). No financial assistance was available, but the support and time boys needed was provided by care home residents. The project has helped community relations and the boys to understand older people better; and one result is that the school and the nursing home are taking down the fence between the two properties so they can work together more closely. A follow-on project has been initiated where planters have been built at the school for growing flowers and vegetables, which the care home residents and the pupils will help to look after together.

**Italy (Liceo scientifico "Ignazio Vian"):** Two different classes in Italy (Liceo Vian and Vittorio Gassman) and another in France participated in this project. The project comprised three main activities: a workshop on the meaning of ageing; production of different posters to publish the workshop content in French and Italian; and a videoconference between two classes (Italy and France), where Italian students asked an Italian grandmother about what life was like in Italy in the past, and vice-versa for Italian students asking a French grandmother. Italian students were involved in translation tasks.

**Poland (Zespół Szkół z Oddziałami Integracyjnymi nr 2):** The goal for the school was to strengthen ties between the people who live in the Wildy (one of the districts of the city of Poznan) to present what has changed in education, as young people realise their hopes and dreams. The purpose was to present the school and collaborate with children with different intellectual capacities, and have contact with other people who have different skills, passions and interests in order to raise awareness among younger generation. Seniors were willing to share their experience and the students learned to respect older people and teamwork, not just peers. It was also a way to

<sup>89</sup> <http://europa.eu/ey2012/ey2012main.jsp?langId=en&catId=970&eventsId=875&furtherEvents=yes>.



promote the school in the local community. Teachers and students visited a centre for the elderly to present the performances "*Nativity*" and "*Picnic with the Family*" - during which children recited poems, sang songs about their mother, father, grandmothers and grandfathers. Together they sang patriotic songs and carols. Students visit the nursing home residents, twice a year give concerts and donate gifts and Christmas cards.

In 2013 the second edition of the project was linked to the "European Year of Citizens" and was used as an opportunity for a discussion of Europe's past and present as well as what older and younger people can do together to build the future of Europe. On the EU Day of Solidarity between Generations the school hosted 26 visitors from the Parish Senior Club under the banner "*Music connects generation.*" A concert of songs from their youthful years was staged and students with different degrees of disability and age were engaged in the project. The compilation of songs consisted of spring hits performed by students, together with "*Goldfish*", prepared by the school theatre group "Poppies".

**Poland (II Liceum Ogólnokształcące im Bolesława Chrobrego w Sopocie):** The activity involved creating flower displays symbolising the flowers of Europe. These were then used as part of a parade through the town of Sopot (on the Baltic coast) culminating in a conference on intergenerational Europe. The student and teachers were joined on the parade by politicians, religious leaders and many people from the town in a day of celebration. An estimated 100 people took part, 20 young people (16/17 year olds), as well as older people and passers by. The following day a meeting was arranged for the older people and the children from the English class at the school to meet an elderly lady to ask questions and discuss her experience of the Warsaw Uprising. There were financial limitations as the school had to fund the activity. However the local council and the University of the Third Age were supportive in terms of in kind support and donations.

**Portugal (Centro Escolar de Portela, Agrupamento de Escolas de Pinheiro):** The activities developed in this school were designed to allow grandparents to revive their traditions. Grandparents shared stories, old songs and toys from their childhood with the students from the school. In the first year (2012) grandparents talked about their childhood toy and grandparents taught the pupils how to make woollen dolls. In the second year (2012), the grandparents made many garlands with yellow flowers collected from the fields. An exhibition of old and valuable photos of grandparents was also organised – this was exhibited in the school for a few days, and was later opened to visitors from the local community. There was also a workshop where grandparents shared stories about their school days and the changes that had occurred in their lives. The grandchildren also prepared a song to perform to the grandparents.

In all of the examples studied, interviewees highlighted positive experiences of **collaboration and team-working**. The value of people of different generations spending time together, overcoming barriers and increasing mutual understanding was widely acknowledged. **Community relations** were strengthened and activities were assessed as equally beneficial to both young and old. Participants found the activities **personally enriching** and successful implementation was supported by high levels of enthusiasm and giving of time and resources, without significant 'official' funding. Few practical problems were encountered; delivery was relatively straightforward and reported **very positive feedback** from all types of participants.

## Lessons

Participation in Generations@school undoubtedly held widespread appeal for many schools – in most of the examples described here, **activity was implemented in 2012 and again in 2013**. For the most part schools were already interested or involved in inter-generational activities and awareness of the European Year itself appears limited. However the opportunity, practical tools and

guidance and publicity (in particular the opportunity to enter a competition) is likely to have boosted interest and prompted action where this would otherwise have been slower or lower in terms of public profile. It might also be argued that **the Year made it more likely that follow-on projects post-2012 would be considered by schools**. The evidence supports the suggestion that the take-up of Generations@school activities during (and importantly after) the EY2012 reflects the essential bottom-up nature of the initiative, the ease with which schools can engage with it and the comparatively low cost.

# Poland

## Purpose

The purpose of the case study on Poland was, like for the other country case study, to collect in-depth information on effectiveness, complementarity, sustainability, gender and accessibility mainstreaming of the EY2012 in a particular country context, and to test a specific hypothesis related to that country.

Poland was chosen for the significant policy outputs that could be associated with the Year, notably the Programme for Senior Citizens Social Activity. We wanted to assess to what extent these policy outputs were affected by the EY2012 and the mobilisation of actors was sustaining the success of such initiatives.

## Country context

### Trends, data and challenges

The National Programme for the EY2012 provides an extensive overview of the demographic and socioeconomic challenges the country is facing.<sup>90</sup> These challenges include the following ones:

- Poland is going through a period of plummeting birth rate. In 2010, the total **fertility** rate in Poland was 1.38 (1.40 in 2009). This represents an increase of 0.16 on the level recorded in 2003 which was the lowest for more than 50 years. Starting from 1992, a continuous increase in the **average lifespan** is observed. It is anticipated that boys born in 2010 will on average live till the age of 72.1 years and that girls will reach the age of 80.6 years. As a result of changes in demographic processes, the number of children and young people (0-17 year old) is dramatically decreasing. In 2009, this situation was reflected in a further reduced proportion of this group in the total population, i.e. to a level of approximately 18.7% (29% in 1990 and approximately 21 % in 2005);
- At the same time, an ageing of the **workforce** can be noted. This is caused by an increasing proportion of non-mobile working-age population (i.e. persons more than 44 years old) and of post-working age population (aged 60/65 and more) in the total population. In 2010, the total share of people in these age groups was 41.1%. The proportion of only post-working age population (men 65 years of age and more, women 60 years of age and more) in the total population was 16.9% (almost 15% in 2000 and under 13% in 1990). Low activity and early withdrawal from the labour market of persons of non-mobile age is one of the basic problems of the Polish economy. The average retirement age was 59,3 in 2007 (below EU Average 2009: 61,4);
- Changes in the population age structure also mean considerable challenges for the **social security system**. The ageing of Polish society implies the necessity of increased social transfers for the benefit of this group of the population (as a result of necessary payments of old age and disability pensions, as well as the provision of appropriate health and care services). A synthetic measure indicating the capacity of the social security scheme is the population dependency ratio. In 2010, there were 55 persons of non-working age per 100 persons of working-age (including 26 persons of post-working age and 29 persons less than 17 years old).

<sup>90</sup> Ministry of Labour and Social Policy (2012). *National Action Plan for the European Year for Active Ageing and Solidarity between generations (2012) in Poland*.

In 2000 this ratio was 64 (24 for post-working and 40 for pre-working age) and in 1990 it was as much as 74 (22 for post-working and 52 for pre-working age);

- Low economic activity of older people and early withdrawal from the labour market significantly contributes to **poorer living standards** for persons of older age. On the one hand, early economic deactivation results in lower old-age pensions. On the other hand, early withdrawal from the market and absence of social activity causes passivity in the lives of older people. These are main factors which may lead, as a consequence, to social exclusion, including financial exclusion and digital exclusion.

Regarding **public health**, the National Action Plan mentions two studies from the National Public Health institute highlighted that it is necessary to create a national policy for the elderly in Poland – barriers which have been identified as restricting the development of initiatives for older people (health and social aspects) include, in particular:<sup>91</sup>

- increased demand for services;
- lack of coordinated assistance and social policy oriented towards senior citizens;
- inadequate supply of care services;
- a healthcare system which does not fully respond to the needs of senior citizens;
- an insufficient number of staff specialised in geriatric care;
- absence of programmes to be used in preventive medicine, in education, and of programmes encouraging senior citizens to become more active, or bad coordination of these programmes.

## Policies

Before the EY2012 Poland had in place a limited number of policy measures aimed at supporting active ageing, principally in the sphere of employment.

Labour market policy activities for the benefit of older workers have been implemented mainly under the 50+ Programme and active labour market policies. The main process contributing to extending occupational activity of older people in Poland is the implementation of the programme *Solidarity between Generations: Measures Aimed at Extending Occupational Activity of Persons Aged 50+*. It was adopted by the Council of Ministers in October 2008. Since then, 10 legislative tasks have been carried out, under the competences of the Minister of Labour and Social Policy, as well as one information task. As a result, a better institutional environment has been created, more friendly towards persons aged more than 50 wishing to remain active. Namely:

- employers employing persons aged 50 or over were exempted from contributions towards the Labour Fund and the Guaranteed Employee Benefits Fund. In addition, the period for which an employer must pay sick-leave benefit was reduced, which resulted in lower labour costs;
- facilities were introduced to enhance occupational qualifications of workers, as well as solutions promoting lifelong learning for unemployed persons and job seekers aged 50 or over;
- new regulations were introduced which limit the number of persons entitled to early retirement;
- appropriate conditions were created for the development of childcare services, thus contributing to counteracting premature deactivation of older people obliged to discontinue their careers out of a necessity to take care of, for example, grandchildren.

In addition, other activities were carried out on a large scale, including training programmes. By 2010, it was possible to train more than 106 thousand persons aged 45/50+.

The objectives of activities in the area of active labour market policy include inter alia re-employment of older people who are either unemployed or at risk of becoming unemployed. These activities are undertaken by public labour services in many areas - in the area of placement, in the

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<sup>91</sup> Ibidem.

area of occupational consulting, or of training. Solutions promoting the employment of older people also include support for employers who invest in the professional development of older workers:

- employers who had created a training fund may apply for a partial refund from the Labour Fund of expenditure incurred in respect of training of their workers;
- in order to encourage employers to invest in the training of older workers, the level of refund of costs involved in the training of persons aged more than 45 is almost double the refund for financing the costs of training of younger workers. Employers may obtain a refund of 80% of costs of training persons aged 45 and more (up to 300% of an average salary).

One of the instruments preventing premature incapacity to work is skilful age management (in an enterprise, in a company, in an organisation, etc.). The Central Institute for Labour Protection – National Research Institute planned to organise in the second half of 2012 a pilot training on the principles governing economic activity of older workers (50 and over), addressed to employers or to their representatives (approximately 20 participants).

Among non employment related initiatives, a protocol for a Comprehensive Geriatric Assessment can be highlighted. A draft standard for geriatric care has been prepared of which the CGA is an integral part. Currently, a legislative procedure has been initiated in order to implement envisaged changes.

## The EY2012 in Poland

### Key input, outputs and activity indicators

The EY2012 in Poland was funded through a contribution of 20 million PLN. Note that this budget was initially part of a larger budget of 60 million PLN that was exclusively reserved for UTAs. Based on three rough indicators, the level of activity was not huge quantitatively speaking, however indicators in the following section provide a more comprehensive picture. There were, according to PAU data:

- 650 press clippings (366 print, 245 online, 39 tv/radio – 16,87 clippings x 1000 000 inhabitants, 22nd place in the ranking of countries by this indicator);
- 41 initiatives in the database (1,06 initiatives x 1000 000 inhabitants, 24th place);
- 110 candidatures to awards (2,41 x 1000 000 inhabitants, 22th place).

### Main country initiatives

Key EY2012 initiatives include:

- The **opening conference *Get involved!*** that was organised by the Ministry of Labour and Social Policy;
- Drafting and adoption of the **Government Programme for Senior Citizens Social Activity 2012-2013**. The main objective of this Programme is to establish the proper conditions under which social activities for the elderly can be developed. It focuses on four priority areas that are similar to the priorities of the EY2012:
  - Education of the elderly;
  - Social integration of the elderly;
  - Social/ political participation of the elderly;
  - Social services for the elderly.
- The possibility for NGOs to **compete for grants** to deliver EY2012 activities. This paved the way for the implementation of a wide variety of EY2012 activities throughout the EY2012.

EY2012 activities were also organised by different ministries: for example, the Ministry of Culture and National Heritage organised free entrance for elderly persons (and sometimes also for

students) to cultural institutions in Poland. In addition, the Ministry of Health organised various projects **in the field of geriatric care**.

**Activities organised by NGOs** included the *Señorada* event that was organised by ESPAR 50+ to bring young and old together. ESPAR 50+ also organised ProWomen 50+ to promote physical exercise among elderly women (Nordic walking, gymnastics etc.). Interviewees indicated that NGOs were able to expand the scope of events thanks to EY2012.

Finally, more than **60 regional and nearly 90 local events** were organised throughout the EY2012.

## Key guiding hypotheses of the case study

The development of various policy initiatives, such as the Programme for Senior Citizens Social Activity, was significantly affected by the EY2012 and the mobilisation of actors is sustaining the success of such initiatives. The EY2012 triggered the development of policy measures at national level. These policy outputs are sustained by the long-term horizon of these measures as well as by the improved mode of cooperation between stakeholders.

## Main findings

### Findings on the evaluation questions

After a late start in November 2011 the National Action Plan (NAP) for the EY2012 in Poland was ready. The NAP followed a consultation process with various NGOs that was coordinated by the Ministry of Labour and Social Affairs. The NAP anticipated on the need to launch grass-roots initiatives for the elderly. In addition, the plan foresaw the establishment of the Polish EY2012 Stakeholder Committee with 50 representatives of NGOs to provide assistance and to identify emerging issues.

Early 2012 a workplan was accepted by the Ministry even though there existed uncertainty about the funding of activities. Concerted action by the various Polish stakeholders working with elderly people managed to convince the government to allocate the necessary funding for EY2012 initiatives. The commitment of the Polish government was strengthened by the establishment of a new Department for senior issues in the Ministry of Labour and Social Affairs. This department in close cooperation with other stakeholders in an especially established Council for Senior Issues managed to realise initiatives that would definitely change the Polish landscape of active ageing policies. These include a wide range of EY2012 initiatives and also a Programme on social activity for the elderly 2014-2020. Both the new Department, the long-term Programme, and the cooperation of NGOs are likely to produce a sustainable impact of the EY2012 on policies and the Polish society.

### Effectiveness and impact

The EY2012 had four priorities for the elderly citizens:

1. Education;
2. Social integration;
3. Social participation;
4. Social services.

One of the key results of EY2012 was the launch of the Government Programme for Senior Citizens Social Activity 2012-2013 in August 2012. This programme includes a grant scheme for activities for the elderly, financed by the State budget. This budget foresees 20 million PLN for 2012 and 40 million PLN for 2013. Already in the EY2012, activities were implemented by NGOs and/ or (local) authorities via this grant scheme.

Many more initiatives have been organised throughout the EY2012 than originally foreseen in the National Action Plan for the Year. According to the evaluation, most of the initiatives implemented through the grant scheme focused on education and social integration.

According to the interviewees the various EY2012 activities were extremely successful in reaching the elderly both at national and at regional/ local level. Most of the participants were female 50+.

The EY2012 had **two main impacts**:

- For the first time, the Ministry of Labour and Social Affairs started to take senior matters seriously. This attention followed from the establishment of a specific Department for senior issues and of the launch of programme for seniors. The Ministry also showed more attention to the voice of organisations working with elderly people in Poland (see below);
- The EY2012 paved the way for greater coordination of the activities of the various organisations that are involved in senior issues. This increased coordination followed from the combined response to the government's original intention to devote the budget for EY2012 solely to the Universities for the Third Age (UTAs) and the preparation of an alternative budget that the government later accepted. In addition, the Council for Senior Issues that consists of different stakeholders (NGOs) was established for developing the long-term Programme on social activity for the elderly 2014-2020. The EY2012 therefore significantly triggered participation.

#### *Complementarity*

Around the same time in which the Commission decided that the EY2012 should focus on Active Ageing and intergenerational solidarity, the Polish Parliament independently decided that 2012 should become the year dedicated to the UTAs. With the exception of the UTAs, no national policies for the elderly existed in Poland prior to the EY2012, it is therefore difficult to speak about complementarity of the Year to national instruments.

With regard to complementarity to EU measures, the EU2020 Strategy recognised demographic shifts as one of the key challenges for the EU. Polish EY2012 activities created synergies with the EU2020 Strategy as they focused on stimulating labour market participation of elderly persons and on raising the retirement age.

The EY2012 was complementary to the activities organised in the framework of the Polish Grundtvig programme. Several activities were co-financed by both Grundtvig and the Polish government. These included the organisation of a three-day conference by the Foundation for Women's Issues that was partially financed via Grundtvig.

Finally, activities that will be implemented through the Programme on Social Activity for the Elderly 2014-2020 will be (partially) financed via ESF. ESF will finance programmes focused on sport and cultural activities that are provided by volunteers.

Volume effects were there, given the increased attention to active ageing and intergenerational solidarity of the Government and the number of activities organised in the framework of the EY2012.

Process effects were also many, given the new relationship modalities between the Ministry and other stakeholders. Also the cooperation amongst non-governmental stakeholders themselves e.g. in the Council for senior issues, displays process effects of the EY2012.

Regarding innovation effects, the main priorities of the EY2012 as set by the Commission were largely adapted in the National Action Plan. For Poland, it proved an innovative approach to foster social integration via education that ultimately could lead to more political participation. Education was considered particularly important because many elderly Polish citizens are lowly educated. This hampers potential employment prospects but also integration into society. In addition, the network approach for social services, e.g. consumer advice, was innovative as it didn't exist before in Poland.

Scope effects are limited but nevertheless achieved by opening initiatives to both sexes and by involving youngsters in activities for the elderly. For example, physical exercise activities that were previously organised by Espar 50+ for women became also accessible for men. In addition, Espar 50+ broadened the target group of their activities to younger people with the organization of the *Señorada*: a picnic for young and old.

#### *Gender and social inclusion mainstreaming*

Preserving a gender balance was considered difficult to achieve in EY2012 initiatives. Poland currently witnesses a feminisation of the country because of the longer life expectancy of women. There are more elderly women than men and the vast majority of participants in EY2012 initiatives were female. In addition, men generally showed less interest in EY2012 initiatives.

This was taken into account by the organisers of EY2012 initiatives as they recognised the need for attracting elderly men. At the same time they recognised that this requires a different approach. In the course of the EY2012 the content of several activities was changed in order to attract male participants. For sport activities this included for example a shift from Nordic walking and gymnastics to football. For trainings this shift included for example a new focus on technology, such as how to use a smartphone.

When drafting the National Action Plan for the EY2012, accessibility was recognised by all parties involved as an important issue. In order to be eligible for receiving EY2012 grants applicants were required to ensure the accessibility for persons with disabilities of their venues. According to the interviewees, venues in Warsaw and other major cities in Poland were accessible for persons with disabilities but it could not be confirmed whether this was also the case for local activities. They could confirm however that the seniors participated in the majority of initiatives.

The facilitation of access of disabled elderly people was set as an eligibility requirement in the grant scheme of the state. In general, the large conferences were accessible for elderly citizens with a disability. In certain cases however, initiatives were unlikely to be accessible. Often the limitations set by historical buildings prevented access. This was also the case with elderly students at UTAs.

During the EY2012 UTAs raised the question on how to improve participation of the disabled elderly. This was organised by expanding the number of volunteers involved who helped the disabled elderly participating in events. These volunteers are often 60+ themselves.

#### *Sustainability*

The following events are likely to generate lasting effects for policy measures on active ageing and intergenerational solidarity.



First, the newly established Department for senior issues. Following the Decision of the President of the Council of Ministers on 16 August 2012 a new Department for senior issues was established in the Ministry of Labour and Social Policy. This department is responsible for developing policy measures for the elderly, the provision of support for the elderly, the implementation of active ageing measures and policies to stimulate intergenerational solidarity. The Department is expected to fulfil these tasks in close cooperation with other Ministries and organisations working with elderly persons. Finally, the department is responsible for coordinating the implementation of the Government Programme for Senior Citizens Social Activity 2012-2013.

Second, the long term Programme on Social Activity for the Elderly 2014-2020 developed by various stakeholders in the Council for Senior Issues. This programme includes a long-term approach to active ageing and intergenerational solidarity. Because the programme was developed by the Ministry in close cooperation with various NGOs, it is likely to be supported in the future by these very NGOs.

Third, the direction of the Polish policy approach to promote labour market participation of the elderly via education and by reforming the pension system. Labour market participation of the elderly is likely to improve in the future once elderly are more fit for the work through their improved education and through more stimuli arising from the reformed pension system.

Fourth, the expansion of the UTA system throughout 2012. The financial envelope for the Government Programme for Senior Citizens Social Activity 2012-2013 included 60 million PLN in total. 40 million PLN is dedicated to the expansion of UTAs.

Fifth, participation of Polish elderly in local politics. Many municipalities now have local Senior Councils that participate in policy making for the elderly. A dedicated law to facilitate the establishment of local Senior councils was recently agreed upon. But even without this law, around 40 of these Councils had already been established by the end of 2012. In addition, the improved level of education of elderly participating in these Councils is likely to enhance their input in (local) policy-making for the elderly.

## Key success factors and challenges

The EY2012 for active ageing and solidarity between generations was launched at a time in which the issue attracted much attention in Poland. There existed in other words a significant need for measures in that field. Of course, the Polish government had initiated (and funded) measures on the UTAs as an attempt to stimulate education among elderly persons in Poland. This approach however was considered much too narrow by many of the Polish NGOs working with elderly persons in Poland. Many of these NGOs have been involved in drafting the National Action Plan for the EY2012, through which their relationship with the Ministry has improved.

NGOs proved successful in their lobby for a more extensive approach to the EY2012. This was mainly due to the fact that the Ministry was prepared to listen to them. The Ministry had been equipped with a new Department for Senior Issues that was managed by a motivated staff and personal contacts with the NGOs also existed already. The success of the EY2012 in Poland was herewith certainly a result of a well-equipped Ministry that was open for suggestions from the field.

The EY2012 can also be considered a success because of the fact that NGOs were able to organise events for the Year. The competition for NGOs enabled them to apply for the funding of

their activities. With these 'grass-roots activities' EY2012 events anticipated really existing needs of the elderly.

Aside from the cooperation between the Ministry and stakeholders like NGOs as a contributing factor, the EY2012 in Poland was also a success because of the cooperation amongst stakeholders themselves. This cooperation started with the concerted lobby for redirecting some of the funds for UTAs to other areas of active ageing and continued with their work in the Council for Senior Issues when drafting the long term Programme on Social Activity for the Elderly 2014-2020.

## Lessons learned

### **EY2012 as a run-up to a comprehensive approach to active ageing in Poland**

The analysis of the EY2012 in Poland at least partially confirms the hypothesis that the EY2012 strengthened the development of policy initiatives on active ageing and mobilised stakeholders. The Year paved the way for the establishment of both short and long term policies for the elderly in Poland that (partially) include a dedicated budget.

2012 was in Poland also the year of the UTAs for which much funding was originally reserved. Concerted action of NGOs inspired by the EY2012 created a partial redirection of this money for initiatives that exceeded the issue of the UTAs.

These initiatives were related to education, social integration and (political) participation of the elderly as well as to social services for elderly. They are now sustained by a new Department for Senior Issues in the Ministry of Labour and Social Affairs and the short and long term government programmes for the elderly as well as by the enhanced cooperation between stakeholders.

### **Implications for future active ageing policies**

The Polish case study shows that active ageing policy that promotes education of the elderly in order to integrate them into society and to enhance their political participation, flanked by social services for the elderly, makes sense in particular for countries with a similar demographic situation and where the elderly are generally lower educated.

The Polish case study also shows the importance of involving a large number of stakeholders like senior people organisations and universities of the third age, and facilitating their grass-roots initiatives. Together with the cooperative stance from the Polish national government, they facilitated the success of the Year. Moreover, the EY2012 became a success because of the self-confident concerted action of grass-roots organisations to convince the Polish government that policies for the elderly should include more than just education policies.

### **Lessons for future European Years**

The EY2012 in Poland shows that an EY in general should not necessarily come along with substantial budgets. An EY can also become a success if the theme of the Year is high on the political agenda of the Member States. It is important to ascertain in advance whether this is the case, for instance by systematically mapping the availability and willingness of key stakeholders in Member States to organise activities on the proposed theme.

## Sources

### List of national documents analysed

Ministry of Labour and Social Policy (2012). *Evaluation EY2012*.

Ministry of Labour and Social Policy (2012). *National Action Plan for the European Year for Active Ageing and Solidarity between Generations (2012) in Poland*.

### List of interviewees

Senator Mr. Mieczysław Augustyn;

Ms. Marzena Breza (Ministry of Labour and Social Policy);

Ms. Marta Gaworski (ESPAR 50+);

Ms. Potocka Halina (Foundation for Women's Issues/ AGE Europe);

Ms. Agnieszka Basińska (CIS- The Centre for Senior Citizens Initiatives).



# Portugal

## Purpose

The purpose of the case study on Portugal was, like for the other country case study, to collect in-depth information on effectiveness, complementarity, sustainability, gender and accessibility mainstreaming of the EY2012 in a particular country context, and to test a specific hypothesis related to the country.

Portugal was chosen as one of the most active countries and because the strong regional and local dimension of the Year represented an interesting feature. In such a setting, we wanted to explore whether participating in an European Year had a significant added value to past and ongoing active ageing-related activities, that could be identified in a number of volume, scope, process, innovation, learning and agenda setting effects.

## Country context

### Trends, data and challenges

The National programme for Portugal describes as follows the main features of the Portuguese socio-demographic situation:

“According to the 2011 Census, Portugal presents a framework of a rather evident demographic ageing, with 19.15% of elderly population (persons aged 65 or over), 14.89% of young people (aged 15 and less), and an average life expectancy at birth of 79.2 years. It is expected that in 2050 the regression trend of the age pyramid will grow, with 35.72% of persons with 65 years, and more and 14.4% of children and young people, as well as an estimated longevity of 81 years. In 2011.

Remarkable is also the majority presence of women in the age group of 65 years or more (58%), compared with the presence of men in the same group (42%); it is a sign of the "feminization" of ageing, observed in the Portuguese society since 1900.

In addition to the longer life expectancy there is also the "ageing of the aged" with the increase of people aged 80 and over. Data published by the United Nations, World Population Ageing, 1950-2050 - Economic and Social Affairs, 2001 also show the existence in Portugal of 300 people aged 100 or more and it is expected that by 2025 this number will rise to 1800 and in 2050 to 6,400. If ageing is a widespread demographic trend in Portugal, the old ages i.e. the ways to live longevity, are multiple and require distinguished policies and other adjusted initiatives" (...).

While these processes clearly represent a challenge for social security and health policies, it can be noted that Portugal has an above EU average employment rate among older workers (it is fourth in the ranking of EU countries for the employment dimension of the Active Ageing Index<sup>92</sup>), which makes the issue of early retirement relatively less urgent.

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<sup>92</sup> <http://www1.unece.org/stat/platform/display/AAI/II.+Ranking>.

## Policies

In Portugal, policy measures have been being developed towards active ageing and the improvement of the quality of life of elderly people in the years preceding the EY2012. A National Plan on Active Ageing had been developed in 2002 in conjunction with WHO activities (the Health City Project). Health and wellbeing-related activities were implemented also at the municipal level under the “active ageing” concept. While the concept of active ageing was mainly used in the health sector, in the employment area Portugal had in place a programme for promoting the employability of older workers running from 2005 to 2008. A number of intergenerational activities had been promoted in the past by the Institute for Youth and sport under the EU – Youth in Action programme.

## The EY2012 in Portugal

### Key input, outputs and activity indicators

The Year in Portugal was funded by a variety of sources: national, regional and local government funding, Foundations and/or NGOs, private companies, the European Social Fund (the ESF contribution was of 70 000 Euros). There was the logistical, financial and administrative support given by the Instituto da Segurança (Social Security Institute), a public institute under the supervision of the Ministry of Solidarity and Social Security. The support of the ESF Operational Technical Assistance Programme was a great contribution to this purpose and it supported part of the operation, in what concerns the dissemination and awareness raising of the European Year. From this contribution, the evaluation highlights the amounts allocated to the Closing Seminar and to the White Paper of Active Ageing, that is in preparation and expected to be published in the first quarter of 2014 (Source: national evaluation).

Portugal was quite active in the submission of candidatures to the EY2012 awards and had an average level of activity with press and in terms of submission of initiatives to the EU database. On these three key activity indicators Portugal performs as follows:

- According to PAU data, 348 press clippings (121 print, 220 online, 7 tv/radio – 33,18 clippings x 1000 000 inhabitants, 16<sup>th</sup> place in the ranking of countries by this indicator)<sup>93</sup>;
- 31 initiatives in the database (2,96 initiatives x 1000 000 inhabitants, 13<sup>th</sup> place);
- 110 candidatures to awards (10,49 x 1000 000 inhabitants, 7<sup>th</sup> place).

Moreover, the EY2012 in Portugal received 1.210 “likes” on the Facebook page, 76,4% of which by women (24,6% of which between 25 and 34 years).

The Year had a national website, [www.envelhecimentoativo.pt](http://www.envelhecimentoativo.pt).

### Main country initiatives

The programme was structured around five operating axes:

- Employment, Work and Lifelong Learning;
- Health, Well-being and Living Conditions;
- Solidarity and Intergenerational Dialogue;
- Volunteering and Civic Participation;
- Knowledge and Social Awareness.

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<sup>93</sup> The national activity report counts 5 radio interviews, 7 TV interviews, 23 articles, interviews and editorials on the press, and 126 public interventions.

Of the numerous initiatives undertaken, 37% were awareness raising campaigns (information/awareness raising, training, conferences and debates), 20% were territorial action programmes developed in partnership networks with the goal of creating supportive environments for older people, 18% concerned the exchange of experiences and good practices and 15% were recreational and sports activities, mostly intergenerational (the remaining being initiatives of different type). Besides the opening event, a closing event was organised with national funding, and a White Book was prepared.

Especially successful initiatives are considered by the National Coordinator:

- The *Portugal Maior* event, organised at the International Lisbon Fair, to sensitise and involve senior people and their families; it was organised with the Portuguese Industrial Association and involved about 20 000 citizens 50+;
- The international Gerontology and Geriatric congress at the Lisbon Fair, involving 350 workers, decision-makers and senior people in a training and skill development activity;
- The European Day of Intergenerational Solidarity, organised with the Inatel Foundation, which saw the participation of 300 people aged 8 to 80+ in intergenerational activities.

## Key guiding hypothesis of the case study

The starting hypothesis of this case study was that in a country with already ongoing active ageing initiatives, participating in an European Year had a significant added value that can be identified in a number of volume, scope, process, innovation, learning and agenda setting effects.

## Main findings

### Findings on the evaluation questions

#### *Effectiveness and impact*

The Year achieved its **immediate outcomes** in Portugal: it contributed to raise awareness in Portugal on the concept of active ageing, by extending its application beyond the health sphere where it was already used; by highlighting the importance of intergenerational solidarity; by promoting participation of senior citizens. It stimulated debate through a number of events and continues to do so via a series of workshops aimed at producing a White Paper on Active ageing. Information was exchanged among practitioners and members of the voluntary sector. A framework for action was created, which resulted especially in local and sectoral level actions (but hopefully in the future also in a national strategy).

As far as **intermediate outcomes** are concerned:

- A protocol was signed for cooperation between the Ministry of Interiors and the Ministry of Solidarity and Social security to combat the loneliness of the elderly, especially isolated ones;
- Existing support **networks** for elderly people at local level (especially for home care) were extended to new localities in the Year by NGOs, local authorities and volunteers;
- **Partnerships** were developed to set up local plans by 193 local councils for social action and 25 inter-council platforms, with local governments and other institutions;
- A **new policy initiative** was the establishment of Senior councils for participation and representations of seniors in local and national policy-making; a coherent national strategy is not yet in place but the National Coordinator is drafting a White Paper that will be the basis for the elaboration of a national strategy;
- **Technological solutions** for the protection of elderly people in their homes were extended to more users, especially through the Portugal Maior fair (Source: National coordinators Survey).

Of the Year **target groups**, the activities are considered to have reached to a very large extent regional and local authorities, and civil society organisations at both national and regional/local level. To some extent also national bodies were involved, especially at the level of the officers participating in the Operational Team (Ministries of Health, Employment, Interior, Youth and Sport Institute, Social Security Institute). The business community was reached via the Portugal Maior fair, and the activities of a Corporate Social Responsibility network GRACE, as well as via the socially oriented bank and Foundation Montepio (active in corporate volunteering). The involvement of social partner organisations was less strong, nonetheless the Economic and Social Council produced a study with proposals on ageing which was presented to the parliament. The general public was reached via the media through the intensive programme of interventions at public events of the National Coordinator. It is felt by the NC that despite signs of recognition of the role of elderly people in society, much work has still to be done to raise awareness among the general public. The fact that local government and civil society played the main role in the Year is reflected also in the statistic of entities organising activities provided by the national evaluation (33% private institutions of social solidarity and similar, 38% local public administration, 13% central public administration, 13% social networks, 2% media companies or professionals, 1% university and research institutions).

All in all, the main **impacts** of the Year in the country are the following ones:

- The concept of active ageing is considered as a model and reference for policies, actions, social support and services;
- Active voice was given to elderly people in the consultation for the implementation of social policies and in the fight against stereotypes; this happened for instance in the municipality of Santa Maria da Feira, where a Forum of Seniors was established to increase the participation of senior citizens in decisions regarding active ageing initiatives concerning them;
- Awareness was raised on the specific characteristics of the ageing process of people with disabilities;
- A number of schools have shown sensitivity towards intergenerational solidarity by incorporating the theme in their annual actions, in coordination with municipalities and entities who work with the elderly;
- The integrated approach of the national territories in a networking process with older people living alone; concretely, the public-private Social Network model whereby social support is provided to vulnerable people in Portugal was strengthened by the Year being at the same time a facilitating factor for the implementation of the Year activities at local level;
- The opening of universities and scientific institutes to the study of issues related to active ageing and production of knowledge to support policy-making in this area; the initiatives (source: national evaluation).

### Complementarity

Portugal successfully used the European Social Fund to support the Year. Moreover, a number of projects developed with the support of **EU programmes** could increase their visibility and impact thanks to the Year. For Instance:

- the RUTIS (Third Age Universities association) concluded with an exchange event in 2012 the national activity of an EU project called Cultural Bridges, funded under the Grundtvig Programme;
- During the Year, RUTIS also had a project approved for the establishment of an active ageing centre in its premises, funded by the PRODER rural development programme (co-financed by the European Agricultural Fund for Rural Development);
- the Year was used to publicise the activities of the Breaking the Taboo project on violence on older women, co-funded by the Daphne Programme;



- the intergenerational component of the Youth in Action programme was linked to the Year by the Youth and Sport Institute through the Generations in Movement initiative.

Complementarity was also strong with **national policies**. For instance:

- In the employment field, two new measures were taken to support policies to retain older workers: training of employment service professionals to assess and develop the skills of 55+ workers, and an awareness raising campaign towards companies to prevent workers' dismissal (this second initiative was however not implemented because of capacity constraints);
- in the health field, the Year was used to sensitise other ministries on the activities developed in the context of the WHO network of Age-Friendly cities;
- in the youth and sport domain, the Year was used in continuity with the 2011 Year of Volunteering to promote intergenerational activities in the context of the sports for all movement;
- in the social security domain, the Year was useful to strengthen the local social support networks and to sensitise on the diversity and complexity of the senior population, which is increasingly active. By highlighting that senior citizens are active and willing to participate, the Year prepared the ground for a paradigm change in the organisation of social services for the elderly;
- In the field of rehabilitation, the Year involved prioritising active ageing projects in funding to NGOs in the context of the national plan on disability;
- even in security policies, the Year was used to develop the ability of local police officers to monitor and support elderly people in their security concerns; by the organisation of activities where children accompanied police officers to visit elderly people, these activities were made known and gained support among the population.

All in all, the **main added value** of the Year seems to have been the **widespread mobilisation of actors**, especially at the grassroots and local level, and the **strengthening of partnerships** between government and civil society. In a country where social support is based on subsidiarity and strong public-private cooperation, the year contributed to reinforce safety nets. Moreover, the Year introduced **participatory mechanisms** (e.g. senior councils) at local level in existing policies and by promoting a more holistic approach to active ageing (beyond the health field).

### Gender and social inclusion mainstreaming

The gender dimension was taken into account in the country, also thanks to the involvement of the government Gender Commission. **Gender** issues related to ageing were addressed in a number of initiatives and projects:

- The Gender and Ageing project: planning the future begins now, promoted by CIG in cooperation with 19 public bodies and a private entity (Santa Casa da Misericórdia de Lisboa), directed to public administration officials;
- Issuing the guide Women, Men and Ageing, for social action structures and security forces;
- EU project Breaking the taboo for a training tool on domestic violence on elderly women;
- An issue of the journal of the Portuguese Association of Women's Studies (APEM) on the Gender and Ageing theme;
- Meeting on Gender, ageing and inter-generationality, with a school and a senior academy, involving students and teachers.

Also **disability** issues received due attention during the Year. The National Rehabilitation Institute played an active role in the operational team. The Generations in Movement event paid special attention to supporting people with reduced mobility: special signs, wheel chairs available and volunteers for support. A meeting was held by the National Coordination to develop a memorandum of proposals on ageing of people with personal needs. Third sector organisations like the Red

Cross developed activities to support people with dementia. Funding to NGOs working on disability issues was targeted to support initiatives for older people.

### Sustainability

There are good reasons to believe that at least some of the effects of the Year will be sustained. First of all, the networks that were mobilised at national and local level are mostly permanent networks that can carry on the legacy of the Year (and actually are already doing so). Secondly, many initiatives are already being repeated. Thirdly, there are plans for following-up the Year.

According to the National Coordinator about 75% of activities were planned to last over time. Examples of lasting initiatives are:

- “Generations holding hands” Project: promoted by the National Republican Guard, it sensitized younger generations on the needs of elderly people who live in isolation;
- Age-friendly cities: this project was strengthened in the EY2012 and will continue and expand afterwards;
- Operation Senior Census – project of the National Republican Guard that identifies senior people living alone, especially in rural areas;
- Programme “Good practices of active ageing in social support facilities, reference to the active ageing concept in all its dimensions, according to defined requirements.

Most significant follow-up initiatives that are being promoted at the national level are:

- a National platform for the representation of elderly people to encourage participation in decision-making on policies and measures affecting them – currently under study;
- a Cooperation protocol between the Ministry of Interiors and the Ministry of Solidarity and Social security to combat isolation of elderly people.
- a White paper on active ageing – will collect the results of a number of regional workshops and consolidate them with a view of drafting a National strategy; it is remarkable that such consultation is deeply involving the outermost regions; for instance, the Azores government recently reported that 75 bodies (Public Administration, private institutions of social solidarity, charities/houses of mercy, voluntary associations, university, schools of nursing, and businesses) were involved in the consultation on the White Paper<sup>94</sup>;
- Updating of the Law on home care services, with expansion and upgrading of provided services.

Successful initiatives of the EY2012 that will be repeated or continued in 2013 and beyond are:

- Portugal Maior – This international fair of products and services for Active Ageing was organised for the first time in Portugal in 2012 and will be repeated this year and beyond;
- Generations in Movement – carried out in the framework of the European Senior Force Day, will be repeated every Year.

### Key success factors and challenges

The Year was organised with the following structure:

- A full time national coordinator, supported by a Technical team (2 FTE) and an Operational Team that gathered representatives of public entities committed to social security, employment

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<sup>94</sup> <http://www.azores.gov.pt/Portal/pt/entidades/pgra-gacs/noticias/A%C3%A7ores+contribuem+para+Livro+Branco+do+Envelhecimento+Ativo+e+da+Solidariedade+entre+Gera%C3%A7%C3%B5es.htm>

and vocational training, education, health, rehabilitation, sports and youth (6 members – monthly meetings);

- A National Monitoring commission comprising 35 elements from the various central and local administration areas, autonomous regions, professional industrial and commercial associations, civil society organisations, academy and experts (met every three months);
- An Ambassador, journalist by profession; a communication and dissemination strategy; participation of the NC in events (128), radio (6) and TV (7) interviews, editorials, articles (23); website, Facebook page (1210 likes).

Among the key success factors, we can list the following ones:

- The **strong leadership of a National Coordinator** with extended networks and a solid reputation among stakeholders at all government levels and in the civil society, gained in a long career as a social security official. As a retired official still very active, the National Coordinator was able to involve and put together an Operational Team with officials from various ministries. She acted as a clear role model by travelling extensively in the country to spread the message of the Year in a myriad of localities;
- The establishment of a **National Monitoring Commission** with representatives of different government branches and stakeholders. This body played an important consultative and supportive role to the National Coordinator and Operational team and ensured that all key stakeholders were on board;
- The **good connection with the EY2011 for Volunteering**. The National Coordinators of the two Years could exchange experience and many associations could develop activities already started in EY2011;
- The **existence of well established local social support networks**, set up by a national programme (*Programa Rede Social*), where a number of stakeholders (social services, health services, law enforcement agencies, private social solidarity institutions) are already organised to cooperate at municipal level. The Year just had to activate these networks to obtain cooperation among stakeholders.

It cannot be denied that despite its successes the Year also faced a number of challenges:

- The existence of capacity and budget constraints that hampered the implementation of some employment-related initiatives;
- The lack of cooperation by certain central government entities in the organisation of the Year (e.g. the Generations@school project was carried out by agreeing directly with the concerned schools, not via the ministry of Education);
- For the future, it is not yet sure to what extent active ageing will be still a priority in the policy agenda, given the government concerns about fiscal consolidation and the strong focus on youth of current employment policies. This will be better understood when the White Paper on Active Ageing will be completed and it will be the time to translate it into a proper national strategy.

## Lessons learned

### The EY2012 usefully complemented national policies

The main hypothesis of the case study, i.e. that the Year would have an added value to complement already existing initiatives, appears to be confirmed:

- Volume effects were noticeable: the national and local policy agendas were supported and the Year saw an increase of initiatives on active ageing, both in terms of adaptation to the theme of already existing initiatives, and in terms of new initiatives. It also saw the extension to Portugal

of initiatives already implemented in other Member States (e.g. the Portugal Maior fair of products and services for elderly people);

- Scope effects could be seen in the broadening of the active ageing field, from health and independent living to participation, employment and (via the theme of intergenerational solidarity) youth policies. It was also seen in the broadening of the range of actors involved; these included not only social or health workers, but for instance law enforcement agents, private company employees as volunteers, school teachers; this often happened thanks to the introduction of the intergenerational solidarity theme;
- It is not clear whether the Year had process effects in terms of reinforcing the skills of those involved, as participating organisations appeared to be already quite active and skilled, particularly those involved in EU projects; the same applies to government officials. However, the existence of a theme, active ageing, greatly facilitated the mobilisation of existing networks and the strengthening of partnerships;
- Innovation effects were produced at various levels: in terms of diffusion of technological innovations, and in terms of new approaches – e.g. approach to social services for the elderly more focused on the active role of users, participatory mechanisms, intergenerational volunteering. The Year clearly put active ageing on the national agenda as the work of a number of institutions and organisations was focused on this topic because of the Year.

### Implications for future active ageing policies

One lesson coming from Portugal is the importance of searching the active participation of senior citizens in all policy initiatives regarding active ageing, for instance by establishing senior councils at national or local level. Another one is the importance of mobilising local social support networks including public institutions, private welfare organisations and families by informing them in advance on the Year and allowing them to develop a programme Year which is tailored to local needs. Intergenerational activities can be extremely useful in achieving such mobilisation.

### Lessons for future European Years

The Year was organised and implemented in 2012, without much prior preparation, but this was facilitated by the fact that the EY2011 and the EY2012 were managed by the same institution and the national coordinators of the two Years could meet and exchange lessons. Also several stakeholders had previously participated in the EY2011 and could easily find thematic connections between the two themes. It seems therefore important to ensure continuity between the European Years both in terms of organisation (e.g. use the same team, or organise lessons exchange meetings between teams) and in terms of content (e.g. linking closing and opening events, highlighting and valuing thematic links in the national programme).

## Sources

### List of national documents analysed:

- European Year for Active Ageing and Solidarity between Generations, Action programme, 2012 – Portugal, January, 2012;
- Ano Europeu do Envelhecimento Ativo e da Solidariedade entre as Gerações, Relatório de Atividades, 2012 – Portugal, Fevereiro 2013;
- European Year for Active Ageing and Solidarity between Generations, Assessment report, 2012 - Portugal, March, 2013.

### List of interviewees:

- Joaquina Madeira, National Coordinator;
- Maria João Quintela and João Abreu, Ministry of Health;

- Teresa Ramilo, Institute for Sport and Youth;
- Jorge Camarate, National Employment institute;
- Manuela Monteiro, National Rehabilitation Institute;
- Representative of the social security Institute;
- Teresa Alvarez, Gender Equality Commission;
- Luisa Desmet, Santa Casa de Misericórdia de Lisboa;
- Cristian Louro – Cruz Vermelha Portuguesa;
- Vera Sampaio - Fundação Montepio;
- António Gomes, Guardia Nacional Republicana;
- Hugo Duarte de Sousa Batista e Guinote, Polícia de Segurança Pública;
- Maria João Almeida, GRACA;
- Patricia Gamacho, Escola João de Deus (participating in Generations@School);
- Luis Jacob, Rede de Universidades Seniores (RUTIS);
- Filomena Bordalo and Lurdes Pombo, Confederação Nacional das Instituições de Solidariedade (CNIS);
- Rita Matos Marreiros, Câmara Municipal de Lagos;
- Manuela Coelho, Câmara Municipal de Santa Maria da Feira (with two representatives of the Senior Council and of the Social security department).



## Annex II Evaluation matrix

**Table A.1.1 Evaluation questions, sub-questions, indicators and sources**

(ED=EU level desk research; ND=National level desk research; EC=EC officials; NC=National Coordinators; ES=EU stakeholders; NS=national stakeholders; CS=Case studies)

Evaluation question	Sub-question	Indicators and descriptors	Source
Relevance / EQ1 - How relevant was the initiative to organise a specific European Year for the promotion of active ageing and solidarity between generations?	Is the theme of active ageing and intergenerational solidarity relevant to current needs of MS and EU citizens?	Number and importance of mentions of active ageing and intergenerational solidarity in recent EU policy documents.	ED (subject already explored, no need to resubmit it to interviewees)
Relevance/EQ2 - How relevant were the EY2012's objectives, thematic priorities and types of initiatives?	Are the four key objectives (awareness-raising, information exchange, commitment and concrete action, combat age discrimination) relevant to the needs of MS and EU citizens?	% of EU officials, National Coordinators, EU stakeholders and National stakeholders that think that the four key objectives reflect urgent needs.	EC, ES NC, NS
	Were the thematic priorities chosen within the broad theme: employment, participation, independent living and the different weight given to these subthemes adapted to MS needs when formulating the National Programmes?	Number and type of preparatory steps taken for defining national priorities (consultations, research, policy review...)	NC, NS
		Emphasis on one of the three key themes in EU plans and national work programmes.	ED ND, NC, NS
		Thematic coverage of the three themes in press articles.	
	Are the types of initiatives undertaken suitable to meet needs of MS and EU citizens?	% of EU officials, National Coordinators, EU stakeholders and National stakeholders that think that the types of initiatives organised at EU level were suitable to meet needs of MS and EU citizens.	EC, ES NC, NS
		% of National Coordinators and National stakeholders that think that the types of initiatives organised at national level were suitable to meet needs of citizens in their country.	NC, NS
		Relevance of EU and national level initiatives undertaken to the needs of MS and EU citizens (as described	ED, ND

Evaluation question	Sub-question	Indicators and descriptors	Source
		in policy documents analysing such needs and the ex ante evaluation).	
Effectiveness and impact / EQ3A - To what extent did the EY2012 deliver the expected results?	<p>To what extent were the planned outputs delivered?</p> <ul style="list-style-type: none"> <li>(multimedia) Outputs of the information, promotion and educational campaign and awards;</li> <li>Training and awareness-raising seminars;</li> <li>Conferences and events on policy topics;</li> <li>Mutual learning seminars, sessions or virtual initiatives;</li> <li>Monitoring reports, indicators, survey reports and other policy knowledge and benchmarking tools (good practice compendia);</li> <li>Declarations, charters, strategies, agreements, and other documents formalising policy commitments;</li> <li>Other (please specify).</li> </ul>	Degree of implementation of EU level work programme.	ED, EC
		Degree of implementation of National Programmes.	NC
		<p>Types of outputs produced, number per type, level of dissemination – EU level activities; specifically for information, promotion and educational campaigns:</p> <ul style="list-style-type: none"> <li><i>Awards</i>: number of candidatures and winners for the various awards;</li> <li><i>Press</i>: no. of press clippings (print and online); country coverage; types of publications reached (relevant to a range of stakeholders); quality value of the clippings (e.g. reporting interventions from influential leaders);</li> <li><i>Website</i>: no. of online items; geographical reach, number of visits, number of unique visitors;</li> <li><i>Social media</i>: number of posts around activity peaks; number and type of discussion threads; number of mentions of the EY and active ageing as a subject; geographical reach; type of users involved.</li> </ul>	ED
		Types of outputs produced and number per type – national level.	NC
	<p>To what extent were immediate outcomes achieved?</p> <ul style="list-style-type: none"> <li>The awareness of policy makers of all levels, civil society, social partners and the business community has been raised;</li> <li>Debate has been stimulated;</li> </ul>	<p>Extent to which this happened at EU level:</p> <ul style="list-style-type: none"> <li>as proven by the descriptions of EU level initiatives;</li> <li>according to qualitative assessments of EC officials and stakeholders.</li> </ul>	ED, EC, ES
		<p>Examples of activities that: stimulated debate...raised awareness...offered a framework for commitment...and information on how they did it.</p>	ND, NC



Evaluation question	Sub-question	Indicators and descriptors	Source
	<ul style="list-style-type: none"> <li>Information has been exchanged among policy-makers and stakeholders, and mutual learning has been developed;</li> <li>A framework has been offered to policy-makers and stakeholders to make public commitments and to take concrete action.</li> </ul>	Examples of journalists, role-models and opinion leaders that became champions of the cause of active ageing during the Year.	ND, NC, CS
	<p>To what extent were intermediate outcomes achieved?</p> <ul style="list-style-type: none"> <li>New networks established;</li> <li>Existing networks strengthened;</li> <li>Synergies and partnerships between government levels/policy areas;</li> <li>Innovative solutions, policies and long-term strategies.</li> </ul>	<p>Examples from EU level and MS of:</p> <ul style="list-style-type: none"> <li>New networks;</li> <li>More participation/wider range of stakeholders/more resources available/more legitimation in country/for existing networks;</li> <li>Synergies and partnerships between government levels/policy areas;</li> <li>Innovative solutions, policies and long-term strategies.</li> </ul>	ED, EC, ND, NC, CS
Effectiveness and impact / EQ4 - Which target groups were reached best? At which level?	Did the outputs reach the target groups in EU level initiatives?	Participation by target group in EU level initiatives.	ED, EC
		Variety of stakeholders involved in the EY2012 Coalition.	ED
	<p>Did the outputs reach the target groups in MS initiatives?</p> <ul style="list-style-type: none"> <li>National governments;</li> <li>regional and local authorities;</li> <li>social partners at EU, national level;</li> <li>civil society organisations at EU, national, regional and local level;</li> <li>the business community, including</li> </ul>	Participation by target group in MS initiatives.	ND, NC
		Variety of stakeholders involved in National Coalitions.	ND, NC
		Ability of involved stakeholders to reach a wider audience of citizens (potential multiplier effect): number of members of their organisations, number of participants in initiatives.	ND, NC
		Type of stakeholders/partners who also organised activities/which activities.	ND, NC, CS

Evaluation question	Sub-question	Indicators and descriptors	Source
	<p>small and medium-sized enterprises, at EU, national, regional and local level</p> <ul style="list-style-type: none"> <li>the general public and the media at EU, national, regional /local level.</li> </ul>	As a reference, the level of involvement of the same stakeholder groups according to evaluations of previous Years.	ED
Effectiveness and Impact / EQ5 - What were the main impacts of the EY2012?	Were there other impacts, besides those expected as intermediate outcomes?	Other impacts of activities beyond those listed under intermediate outcomes according to EC, NC and stakeholders.	EC, ED, NC, ND
	What are, all in all, the main impacts (expected and unexpected)?	Examples of significant lasting impacts in each MS.	NC, NS
Effectiveness and impact/ EQ 6 - How and to which extent did major European events contribute to achieving the EY2012s objectives?	<p>What was the contribution to the achievement of the EY2012 objectives (via the outputs, immediate outcomes and intermediate outcomes) of:</p> <ul style="list-style-type: none"> <li>EU opening conference in Copenhagen;</li> <li>Journalist's conference (19/20 March 2012);</li> <li>Generations@school Project around 29 April 2012;</li> <li>Conference on "Good Governance for Active and Healthy Ageing"(4 June 2012);</li> <li>European Award Scheme;</li> <li>European Year 2012 and Social Action day around the International Day of Older People (1st October 2012);</li> <li>European Year 2012 Closing Conference in Cyprus (10 December).</li> </ul>	See EQ3A sub-question on immediate outcomes – EU level initiatives.	See EQ3A sub-question on immediate outcomes EU level initiatives

Evaluation question	Sub-question	Indicators and descriptors	Source
Complementarity / EQ7 - How complementary was the EY2012 with regard to other EU policies or policies in the Member States in the context of active ageing and solidarity between generations?	How complementary was the EY2012 to ESF, Lifelong Learning Programme, ERDF, PROGRESS, Other EU or national instruments?	Examples of activities organised for the EY2012 that influenced the design and regulation of: <ul style="list-style-type: none"> <li>• ESF;</li> <li>• LLL programme;</li> <li>• ERDF;</li> <li>• PROGRESS;</li> <li>• Other EU or national instrument and how far these examples are widespread in MS.</li> </ul>	EC, ES
		Examples of use of these instruments for active ageing in terms of funding and how far these examples are widespread in MS.	ND, NC, CS
	<i>Volume effects</i> - To what extent did the EY2012 increase the volume of EU and MS policy initiatives with an impact on active ageing?	Effects on national policies and bodies (if any, and examples): <ul style="list-style-type: none"> <li>• Activities previously conducted in one or few Member States were extended to more Member States.</li> </ul>	ND, NC, CS
	<i>Process effects</i> - To what extent did the EY2012 facilitate or hamper implementation of EU and MS policy initiatives, by building capacity, strengthening actors, bringing new actors, etc.?	Effects on national policies and bodies (if any, and examples): <ul style="list-style-type: none"> <li>• The national policy agenda was supported;</li> <li>• The knowledge and skills of those involved in the organisation of the Year were strengthened;</li> <li>• Actors from other Member States were involved in national activities.</li> </ul>	ND, NC, CS
	<i>Innovation, learning and agenda setting effects:</i> To what extent did the EY2012 serve to integrate new themes and good practice elements in EU and MS policy initiatives?	Examples of initiatives considered innovative for content, methods used, etc.  Use of social media by NCs and national stakeholders.	ND, NC, NS, CS
	<i>Scope effects</i> - To what extent did the EY2012 broaden the scope of EU and MS policy initiatives, by introducing new themes, issues, target groups etc.?	Effects on national policies and bodies (if any, and examples): <ul style="list-style-type: none"> <li>• Target groups broadened;</li> <li>• New topics added on the agenda;</li> <li>• Involvement of actors not previously engaged.</li> </ul>	NC, NS, CS

Evaluation question	Sub-question	Indicators and descriptors	Source
Efficiency / EQ8 - Was the EY2012 implemented efficiently or could better results have been achieved with the available resources (human and financial) at the EU level?	<ul style="list-style-type: none"> <li>Which resources were used in qualitative and quantitative terms (human and financial)?</li> <li>How do these resources compare to those used for previous Years?</li> <li>Were worse, same or better results achieved with a lower amount of resources than in the other years?</li> </ul>	Main sources of funding, and amounts if possible.	ED, ND, NC
		Estimate of total money available for the Year and outputs generated in comparison with previous Years at EU level	ED, ND, NC
		Examples of activities requiring little funding but with great impact.	EC, ES, NC, NS
		% of National Coordinators and National stakeholders that think that the EY2012 would have generated different results if direct funding would have been available.	EC, ES, NC, NS
Gender and social inclusion mainstreaming/ EQ9 - How and to what extent was the gender dimension taken into account in initiatives, at EU and national level?	<ul style="list-style-type: none"> <li>How and to what extent were the realities and specific needs of (ageing) men and women identified and addressed in the activities and outputs?</li> </ul>	Examples of how the gender approach was mainstreamed in EY2012 activities and how widespread they are in MS.	ED, EC, ES ND, NC, NS, CS
		Proportion of activities/content relevant to women and men in the website (balance).	ED
	<ul style="list-style-type: none"> <li>To what extent were the two sexes represented in key governance and consultative bodies of the Year (NCs, stakeholders' coalition).</li> </ul>	Share of women and men among: <ol style="list-style-type: none"> <li>National Coordinators;</li> <li>Representatives of stakeholders' coalition.</li> </ol>	ED
	<ul style="list-style-type: none"> <li>To what extent were women and men represented among speakers at major events?</li> </ul>	Share of men/women among speakers and participants at EU and national launching and closing events.	ED, ND, NC
Gender and social inclusion mainstreaming/ EQ10 - How and to which extent was the accessibility of the activities ensured for persons with disabilities?	<ul style="list-style-type: none"> <li>How and to what extent were disability issues addressed in the EY2012 activities and outputs?</li> </ul>	Examples of how disability issues were dealt with in EY2012 initiatives (EU and MS) and how widespread they are in MS.	ED, EC, ES ND, NC, NS, CS
	<ul style="list-style-type: none"> <li>How and to what extent was the</li> </ul>	Share of initiatives where accessibility was ensured (built	EC, NC

Evaluation question	Sub-question	Indicators and descriptors	Source
	accessibility of initiatives ensured for persons with disabilities? For which type(s) of disability?	environment, transportation, accessible format of docs, sign language interpretation, speech-to-text facilities).	
Implementation and delivery mechanisms / EQ 11 - How relevant and effective were the management structures and delivery mechanisms at EU and national levels? Could alternatives be envisaged?	<ul style="list-style-type: none"> <li>How relevant and effective were the EU level management, consultative and governance bodies like the EY2012 task force, the EY2012 National Coordinators group, the EY2012 stakeholders' coalition?</li> </ul>	% of EC officials, EU stakeholders and National Coordinators that are satisfied with planning and functioning NC meetings.	EC, ES, NC
		% of EC officials, National Coordinators and EU stakeholders that are satisfied with planning and functioning of the EY2012 stakeholders' coalition meetings and interaction with EC.	EC, ES, NC
		Suggestions for improvement in the organisation of future Years.	EC, ES, NC
		Comparison with previous Years.	ED
	<ul style="list-style-type: none"> <li>How relevant and effective were the management structures and delivery mechanisms at national level: National Coordinators, national stakeholders' coalitions, interaction with the EC representations in MS and the national representative of the communication contractor?</li> </ul>	Number and variety of public bodies, ministries and agencies involved in participating countries and how coordination effort was organised.	NC, NS
		% of National Coordinators and national stakeholders that are satisfied with the organisation of coordination with stakeholders/Steering Group at country level.	NC, NS
		% of National Coordinators that are satisfied with the assistance of the communication contractor and examples of assistance.	NC, NS
		% of National Coordinator and of National EC representatives that were satisfied with their cooperation.	NC, NS
		Suggestions for improvement of the organisation of future Years.	NC, NS
	<ul style="list-style-type: none"> <li>How effective was the communication and coordination between EU level and national level management structures?</li> </ul>	% of EC officials and National Coordinators satisfied with communication and coordination between EU level and national level management structures.	EC, NC

Evaluation question	Sub-question	Indicators and descriptors	Source
Implementation and delivery mechanisms / EQ 12 - How, and how effectively, have relevant stakeholders (regional, national authorities and NGOs and social partners) been involved (at the EU and national levels)?	<ul style="list-style-type: none"> <li>How were stakeholders involved in the implementation of the EY2012 at EU and national level?</li> <li>Would greater involvement have resulted in higher impacts, at EU or MS level?</li> <li>What are examples of extensive involvement and can these be considered best practices in terms of involvement but also in terms of results and impacts?</li> </ul>	% of EC officials, National Coordinators and EU stakeholders that are satisfied with planning and functioning of the EY2012 stakeholders' coalition meetings and the interaction with the EC. <i>(repeated indicator).</i>	EC, ES, NC
		Examples of impacts of cooperation with stakeholders via the stakeholders' coalition.	EC, ES, NC
		Examples of partnerships between the European Commission and stakeholders on specific activities.	EC, ES, NC
		% of National Coordinators and national stakeholders that are satisfied with the organisation of coordination with stakeholders/Steering Group and satisfaction with the cooperation at country level with stakeholders. <i>(repeated indicator).</i>	NC, NS
		Proportion of MS where the various types of stakeholders also organised activities/which activities.	ND, NC, NS
		Examples of partnerships between the National Coordinator and stakeholders on specific activities.	ND, NC, NS
Sustainability / EQ 13 - To which extent is the EY2012 likely to provide a lasting effect?	<ul style="list-style-type: none"> <li>What measures have been taken at EU or MS level to ensure lasting effects?</li> <li>Are initiatives expected to continue after 2012?</li> </ul>	Successful national EY2012 initiatives that will be repeated in 2013 and beyond.	ND, NC, NS
Sustainability / EQ 14- Which type and area of initiatives, delivery mechanisms and stakeholders involvement were particularly successful in providing lasting effects?	<ul style="list-style-type: none"> <li>What lasting effects can be expected from various types of policy and project initiatives? Under which conditions?</li> <li>Which factors further or hamper sustainability?</li> <li>Which are good examples of</li> </ul>	Most significant follow-up initiatives at EU Level.	ED, EC, ES
		Examples of successful EU-wide EY2012 initiatives that will be repeated or that will continue in 2013 and beyond.	ED, EC, ES
		Examples of policy changes that ensure the consolidation and persistence of EY2012 results.	ND, NC, CS
		Most significant follow-up initiatives at national level.	ND, NC, NS

Evaluation question	Sub-question	Indicators and descriptors	Source
	initiatives providing lasting effects?	Other examples of national activities planned or started 2012 that are still having a lasting effect and how widespread they are in MS.	ND, NC, NS
		National initiatives linked to the European Year of Citizens.	ND, NC
Sustainability / EQ 15 - What recommendations can be drawn with regard to 1) active ageing measures and actions and 2) future European Years?	<ul style="list-style-type: none"> <li>What lessons can be drawn with regard to active ageing policies, measures and actions?</li> <li>What lessons can be drawn with regard to future European Years?</li> </ul>	Key issues and policy lessons drawn from EY2012 activities at EU level.	ED, EC, ES, ND, NC, NS, CS
		Lessons from evaluations of prior Years and this Year on the practical implementation European Years.	ED, EC, ES, ND, NC, NS, CS





## Annex III Questionnaires



# Evaluation EY2012- Questionnaire for National Coordinators

## 1. Background information

Name

Organisation

Your position in the organisation

Country

**Part I: Organisation and implementation** This section will ask you about the organisation and relations with all stakeholders of the EY2012 in general at EU level and in your country specifically. It is the largest section of the survey and contains 17 questions.

## 2. What other public bodies, ministries, agencies or department(s) were involved in managing the EY2012 in your country? Under part B, please specify their role and how their involvement was coordinated

	Part A: Name of the organisation	Part B: Coordination
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>

## 3. For the next two sub-questions, please indicate the personnel required for the set-up and organisation of the EY2012 (from start to finish). Please include the position as National Coordinator as well.

A. How much staff time in person/months (including your own) was devoted to the preparation of the EY2012 by the team of the National Coordinator? Please distinguish 2011 and 2012.

B. How many different people worked together? (Total number of people)

**4. Please tick what activities were initiated, coordinated or organised by the team of the National Coordinator.**

Launching event

Closing event

Action day 1: Generations@school

Action day 2: Seniorforce day

National website

Contribution to EU website

Selection of award candidates (National Jury member)

Distribution of communication campaign materials

Other event or activity, please specify

.....

**5. Please specify briefly your role and degree of involvement in each activity.**

	Role and degree of involvement
Launching event	
Closing event	
Action day 1: Generations@school	
Action day 2: Seniorforce day	
National website	
Contribution to EU website	
Selection of award candidates (National Jury member)	
Distribution of communication campaign materials	
Other activity, please specify .....	

**6a. Please specify whether the communication contractor (PAU Education) was involved or not in the following activities:**

	Yes	No
Launching event	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Closing event	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Action day 1: Generations@school	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Action day 2: Seniorforce day	<input type="checkbox"/>	<input checked="" type="checkbox"/>
National website	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contribution to EU website	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Selection of award candidates (National Jury member)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Distribution of communication campaign materials	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other activity or event; please specify .....	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**6b. How would you define your cooperation with PAU Education in the following activities?**

	Excellent	Good	Average	Poor	Very poor	Please explain
Launching event	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Closing event	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Action day 1: Generations@school	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Action day 2: Seniorforce day	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
National website	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Contribution to EU website	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Selection of award candidates (National Jury member)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Distribution of communication campaign materials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Other event or activity, please specify .....	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**7. Please tick if you have used any of the following publications circulated during the EY2012.**

	Widely used	Used occasionally	Not used	Please explain
How to promote active ageing in Europe (EU funding instruments)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Eurobarometer Special Survey on Active Ageing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Eurostat : A statistical portrait of the European Union 2012. Active Ageing and Solidarity between generations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
The EU contribution to Active Ageing and Solidarity between generations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Demography, active ageing and pensions. Social Europe Guide	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

**8. Did the following types of stakeholders/partners also organise activities in your country? If so, please briefly explain what kind of activities they organised.**

	Yes	No	Kind of activities
EC Representations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Social partners (Trade Unions, employers' association)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
NGOs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
National authorities (other than the National Coordinator)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Regional and local authorities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Business (private sector companies)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Other, please specify .....	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

**9. Did you set up a stakeholders' committee or coalition?**

Yes

No

**10. If so, could you please specify the number and type of participants (NGOs, social partners, regional and local authorities, etc.) of the stakeholders' coalition/committee?**

**11. If so, how many times did the stakeholders' coalition/ committee meet?**

**12. If so, what were the tasks and responsibilities of the stakeholders' coalition/committee?**

**13. Have any activities been implemented through a partnership between the National Coordinator and stakeholders? Please shortly describe the activity.**

	Activity	Description
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>

**14. Could you please specify if the initiatives (activities, events, etc.) included in the EY2012 EU database represent the totality of initiatives undertaken in your country?**

Yes, they are all in the database

No

**15. Could you provide a list of the additional initiatives undertaken?**

I will list the additional initiatives below

I will email the list in a separate document to [annemieke.pickles@ecorys.com](mailto:annemieke.pickles@ecorys.com)

**16. Space to list the additional initiatives**

**17. Have you set up a national EY2012 website?**

Yes, a national website stand-alone and specific for the EY2012

Yes, an integrated page in the website of the ministry

No



**18. Approximately how many of all the initiatives undertaken in your country used the logo of the EY2012? (in percentages)**

% of all the initiatives

**19. Approximately, how many of all the initiatives undertaken in your country would have taken place also without the EY2012? (in percentages)**

% of all the initiatives

**20. Please explain what type of initiatives would have taken place without the EY2012 and why.**

**21. How satisfied are you with...**

	Very satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Please explain
The planning and functioning of the meetings of National Coordinators?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
The cooperation with the EC Representation in your country?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
The communication and coordination between EU level and national level management structures?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**22. What would you propose to improve in the organisation of future European Years?**

**Part II. Relevance** The following 4 questions will ask you about the relevance of the EY2012 theme and activities to the needs in your country.

**23. When planning the activities of the EY2012 in your country, how did you rate the urgency of the issues listed below in the context of promoting active ageing?**

	Very urgent	Urgent	Not so urgent	Not at all urgent	Cannot say	Please explain
The need for awareness raising	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>
The need for information exchange and mutual learning	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>
The need for public commitments and concrete action	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>
Any other needs not listed here	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>

**24. How relevant did you find the format and the contents of the following initiatives to the issues and needs existing in your country ?**

	Very relevant	Relevant	Neither relevant nor irrelevant	Not so relevant	Not at all relevant	Cannot say	Please explain
Opening event of the EY2012 in Copenhagen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Closing event of the EY2012 in Nikosia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Generations@school Project and award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Conference on good governance for active and healthy ageing (June 2012)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Senior Force Day 1st October 2012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Journalist award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Life story challenge award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Workplaces for all ages award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Towards age-friendly environments award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Active ageing index	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Common principles on active ageing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**25. Did the definition of your national programme and the choice of thematic priorities include the following preparatory steps?**

	Yes	No
Consulting national stakeholders and social partners individually	<input type="checkbox"/>	<input type="checkbox"/>
Organising periodical stakeholders meetings, setting up a stakeholders committee or coalition	<input type="checkbox"/>	<input type="checkbox"/>
Conducting background research on country needs	<input type="checkbox"/>	<input type="checkbox"/>
Reviewing national policy documents and strategies	<input type="checkbox"/>	<input type="checkbox"/>
Other preparatory steps (please specify) .....	<input type="checkbox"/>	<input type="checkbox"/>

**26. How much emphasis was put on the following themes of the EY2012 in your country? Please rate from 1 to 5 (1=minimum emphasis 5=maximum emphasis). Please explain how and why certain themes were emphasized**

	1 minimum emphasis	2	3	4	5 maximum emphasis	How & Why
Employment	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>
Participation in society	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>
Independent living	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>
Intergenerational solidarity	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	<input type="text"/>

**Part III. Effectiveness** This section contains 7 questions about the results and impact of the EY2012 in your country.

**27. To what extent has the National Work Programme been implemented in the course of the EY2012?**

To a very large extent

To a large extent

To some extent

To a limited extent

Not at all

**28. (If the answer is to some extent, to a limited extent or not at all) Please explain why the National Work Programme has been partially or not at all been implemented in the course of the EY2012.**

**29. To what extent have the following target groups been reached in the various EY2012 activities implemented in your country?**

	1 To a very large extent	2 To a large extent	3 To some extent	4 To a limited extent	5 Not at all	Please explain
National government bodies – ministers and high level officials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
National government bodies – mid and low-level officials	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
Regional and local authorities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
Social partners, trade unions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
Social partners, employers' associations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
Civil society organisations – national level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
Civil society organisations – regional and local level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
Private companies – large enterprises	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
Private companies - small and medium-sized enterprises	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
The general public via the media – national level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>
The general public via the media – local level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	◀	▶	▲	<input type="text"/>

**30. Can you provide 2-3 examples of activities in your country that you consider especially successful? Consider in particular activities that: A.Stimulated the debate and allowed information exchange and mutual learning among policy-makers and stakeholders B.Offered a framework to policy-makers and stakeholders to make public commitments and to take concrete action C.Raised awareness of policy makers at all levels, civil society, social partners and the business community**

						Please specify if the activity was organised		
	Name of the activity	Implementing body	Target group/ participants (and number)	Place	How did the activity contribute to the result?	1 Just because of the EY2012	2 Also because of the EY2012	3 Independently from the EY2012 (would have taken place anyway)
Example 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Example 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Example 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**31. Which of the following outputs were produced in your country in connection with the EY2012?If yes, please provide some quantitative information, if available (e.g. number of items, number of copies distributed)**

	Yes	No	Do not know	Quantitative information
(Multimedia) Information, promotion and educational campaigns and awards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Training and awareness-raising seminars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Conferences and events on policy topics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Mutual learning seminars or online webinars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Monitoring reports, survey reports, indicators systems and other policy knowledge and benchmarking tools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Declarations, charters, strategies, agreements, and other documents formalising policy commitments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Other, please specify .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**32. Which of the following lasting impacts have been achieved to date as a result of EY2012 activities in your country? Please provide examples and evidence of the achievement of such impacts; positive answers without an explanation will not be considered.**

	1 Yes	2 No	3 Do not know	Please explain
There are new networks where policy-makers and stakeholders work together on active ageing policies and the exchange of good practices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Existing networks which work on active ageing in the country have become stronger (e.g. have increased their membership or have intensified cooperation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
There are more synergies and partnerships on active ageing between policy makers of different government level (national/regional/local) and/or different government departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
New policies and long-term strategies on active ageing are being implemented at national or regional level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Technological, organisational, social innovations that favour active ageing are now better known and available to citizens and stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**33. What other impacts of the EY2012 do you detect in your country?**



**34. What would you regard as the most significant lasting impact of the EY2012 in your country?**

**Part IV. Complementarity** This section contains 4 questions about the complementarity of the EY2012 with other initiatives and its added value

**35. Was it discussed in any of the EY2012 activities how to promote active ageing through the following EU funding instruments? Under Part B, please explain and describe what was discussed and in which activities**

	1 Yes	2 No	3 Do not know	Part B
European Social Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Lifelong Learning Programme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
European Regional Development Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
PROGRESS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Other EU or national programme or instrument, please specify .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**36. Did the EY2012 involve any actors that were not previously engaged in the promotion of active ageing and intergenerational solidarity?**

Yes, many

Yes, a few

None

**37. Please explain which new actors were engaged in the promotion of active ageing and intergenerational solidarity.**

**38. Please provide a maximum of four examples of EY2012 activities that you consider especially innovative (for the topic, the form, the tools employed, etc.) and that could be further disseminated.**

			Level	
	Title of activity	Innovative features	1 National level	2 EU level
Example 1	<div></div>	<div></div>	<input type="checkbox"/>	<input type="checkbox"/>
Example 2	<div></div>	<div></div>	<input type="checkbox"/>	<input type="checkbox"/>
Example 3	<div></div>	<div></div>	<input type="checkbox"/>	<input type="checkbox"/>
Example 4	<div></div>	<div></div>	<input type="checkbox"/>	<input type="checkbox"/>

**39. The EY2012 was supposed to reinforce national policies for active ageing. To what extent could the following effects be detected in your country? Please provide examples and evidence on these effects. Positive answers without explanation cannot be included in the analysis.**

	1 To a very large extent	2 To a large extent	3 To some extent	4 To a limited extent	5 Not at all	Please provide an example
Target groups of active ageing policies were broadened	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Active ageing became a higher priority in national policy-making	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
New initiatives promoting active ageing were launched	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
New topics related to active ageing were included in the national policy agenda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Expertise and skills of relevant key stakeholders were strengthened	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Organisations from other Member States became involved in national activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
National policies took inspiration from policies and initiatives from other Member States	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**Part V. Efficiency** The following 6 questions ask about the origin and use of funding for the EY2012 in your country.

**40. What were the main sources of funding that were used to organise the activities of the EY2012? Please include here sources of funding used by any governmental body or stakeholder who organised activities in the EY2012**

National government funding

Regional or local government funding

Foundations and/or NGOs

Private companies

European Social Fund

Lifelong Learning Programme

European Regional Development Fund

PROGRESS

PAU Education, contractor for the EY2012 communication

Other, please specify  
.....

**41. Please mention, whenever possible, the amount of funding in Euro made available each source to the National Coordinator Team and what it was used for.**

National government funding	<input type="text"/>
Regional or local government funding	<input type="text"/>
Foundations and/or NGOs	<input type="text"/>
Privat funding	<input type="text"/>
European Social Fund	<input type="text"/>
Lifelong Learning Programme	<input type="text"/>
European Regional Development Fund	<input type="text"/>
PROGRESS	<input type="text"/>
PAU Education, contractor for the EY2012 communication	<input type="text"/>
Other	<input type="text"/>

**42. Can you estimate the total amount of money in Euros (from all sources, EU, national, public, private) that was available for the EY2012 in your country? Please provide amounts for the budget of activities organised or co-organised by the National Coordinator Team and, if possible, also an estimate of the overall amount of funding used by all bodies and stakeholders who organised activities in the EY2012**

Budget of the National Coordinator team in Euro

Overall amount of funding in Euro

Please specify what is included in this amount.

**43. Please name examples of activities that required little funding and had great impact.**

1

2

3

4

5

**44. Do you think that the EY2012 would have generated different results if there would have been direct funding available in line with the EY2010 and EY2011?**

Yes

No

Do not know

**Please explain why**

**Part VI. Gender** The next 2 questions ask about gender mainstreaming in the EY2012 in your country.

**45. Please provide examples of how the gender approach was mainstreamed in EY2012 activities implemented in your country.**

1

2

3

4

5

**46. What was the gender composition of speakers and participants at the events? Estimate if necessary. If the data is unknown, please enter '0'**

	Speakers (share of women (%))	Participants (share of women (%))
Launching event	<input type="text"/>	<input type="text"/>
Closing event	<input type="text"/>	<input type="text"/>

**47. Has 'having a gender balance' been a criteria for selecting the speakers at either events?**

Yes

No

**Part VII. Accessibility for persons with disabilities** The following 2 questions are about the access for persons with a disability to the activities and events in your country.

**48. Did EY2012 activities organised by the National Coordinator ensure the following:**

	1 All	2 Almost all	3 Half	4 Some	5 Very few	6 None	Please explain how they did ensure that
Accessibility of built environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Transportation that was accessible for disabled people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Accessible document formats and web pages, easy to read versions (large fonts)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Sign language interpreters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Speech-to-text facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**49. Please provide examples of how disability issues were dealt with in the EY2012 activities implemented in your country.**

1	<input type="text"/>
2	<input type="text"/>
3	<input type="text"/>
4	<input type="text"/>
5	<input type="text"/>

**Part VIII. Sustainability** This section contains the last 5 questions of the survey. These questions are on the continued use of the activities beyond the closing of the EY2012.

**50. Approximately what percentage of the activities that were initiated during the EY2012 have a lasting effect after 2012?**

**51. Please provide a maximum of 5 examples of such lasting activities.**

1

2

3

4

5

**52. What are the most significant follow-up initiatives of the EY2012 at the national level?**

Initiative 1

Initiative 2

Initiative 3

**53. Which successful initiatives of the EY2012 will be repeated or continued in 2013 and beyond in your country? Please provide the name of each initiative (maximum 3) and explain how they will be repeated or continued.**

Example 1

Example 2

Example 3

**54. Has any link been created between...**

	1 Yes	2 No	Please explain
EY2012 initiatives and the 2013 European Year of Citizens?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>



**Do you have any additional comments on the EY2012?**



# Evaluation EY2012- Questionnaire for National Stakeholders

## Background information

### 1. Name

### 2. Organisation

### 3. Type of organisation

Regional or local authority (or association thereof)

Employers' association

Trade union organisation

Civil society organisation (NGO)

Media organisation

EC representation

Other, please specify

.....

### 4. Your position in the organisation

### 5. Country

## A. Relevance

### 6. Are you aware that 2012 was the European Year for Active Ageing and Solidarity between Generations? (From now on, we will refer to it as EY2012)

No, I am not aware of it (-> you do not need to continue filling the questionnaire, thank you)

Yes, but I did not participate in any activity related to the Year (->you do not need to continue filling the questionnaire, thank you).

Yes, and I participated in activities related to the Year (or my organisation did so)

Yes, and I cooperated in the planning of the activities of the Year in my country (or my organisation did so)

Yes, and my organisation participated in a national stakeholders' coalition/committee?

Other, please specify

.....

### 7. Could you please briefly describe how your organisation was involved in the EY2012?

### 8a. Are you satisfied with your cooperation with the National Coordinator of the EY2012 at the competent ministry?

Very satisfied

Satisfied

Neither satisfied nor dissatisfied

Dissatisfied

Very dissatisfied

Not relevant

**8b. Please explain**

**9. Was your organisation a member of the Stakeholder Coalition at the EU level?**

No

Yes

**10. How do you assess the work of the Stakeholders' Coalition? Please mention positive and less positive aspects**

**11. Active ageing is about preventing the early retirement from work of older people, combating isolation of older people through participation, preserve good health and independent living in older ages and foster solidarity between younger and older generations. How much emphasis was put on the following themes of the EY2012 in your country? Please rate from 1 to 5 (1=minimum emphasis 5=maximum emphasis).**

	1	2	3	4	5	Cannot say
Employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Participation in society	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Independent living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intergenerational solidarity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**12a. To what extent do you think that these themes were addressed by the EY2012 activities in a manner that is relevant and appropriate for your country?**

To a very large extent

To a large extent

To some extent

To a limited extent

Not at all

Cannot say

**12b. Please explain**

## B. Effectiveness

**13. To what extent did the EY2012 achieve the following results in your country?**

	1 To a very large extent	2 To a large extent	3 To some extent	4 To a limited extent	5 Not at all	6 Cannot say
Policy makers of all levels, the civil society, social partners and the business community have been made aware of the importance of active ageing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The issue of active ageing has being publicly debated	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy-makers and stakeholders have exchanged information on active ageing and learned from each other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Policy-makers and stakeholders have had the opportunity to express their and to take concrete actions to promote active ageing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other, please specify .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

#### 14. To what extent did the EY2012 reach the following target groups in your country?

	1 To a very large extent	2 To a large extent	3 To some extent	4 To a limited extent	5 Not at all	6 Cannot say	1.1. Please explain why you think that certain target groups were or were not reached
National government bodies – ministers and high level officials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
National government bodies – mid and low-level officials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Regional and local authorities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Social partners, trade unions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Social partners, employers' associations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Civil society organisations – national level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Civil society organisations – regional and local level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Private companies – large enterprises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Private companies - small and medium-sized enterprises	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
The general public via the media – national level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
The general public via the media – local level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>



**15. Did the EY2012 produce the following results in your country?**

	No	Yes	Cannot say	Please explain
There are new networks where policy-makers and stakeholders work together on active ageing policies and the exchange of good practices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Existing networks which work on active ageing in the country have become stronger (e.g. have increased their membership or have intensified cooperation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
There are more synergies and partnerships on active ageing between policy makers of different government level (national/regional/local) and/or different government departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
New policies and long-term strategies on active ageing are being implemented at national or regional level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Technological, organisational, social innovations that favour active ageing are now better known and available to citizens and stakeholders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

**C. Sustainability**

**16. Are you aware of any successful initiatives of the EY2012 that will be repeated or continued in 2013 and beyond in your country?**

No

Yes

**17a. Please provide the name of each initiative (maximum 3)**

Initiative 1

Initiative 2

Initiative 3

**17b. Explain how they will be repeated or continued**

Initiative 1

Initiative 2

Initiative 3

**18. All in all, what went well and what went less well in the EY2012 in your country?**

Things that went well

Things that went less well

**19. Are there any policy lessons on active ageing to be drawn from the EY2012 in your country? Which ones?**

**20. Has your organisation planned any follow-up activities? Which ones?**



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P.O. Box 4175  
3006 AD Rotterdam  
The Netherlands

Watermanweg 44  
3067 GG Rotterdam  
The Netherlands

T +31 (0)10 453 88 00  
F +31 (0)10 453 07 68  
E [netherlands@ecorys.com](mailto:netherlands@ecorys.com)

W [www.ecorys.nl](http://www.ecorys.nl)

***Sound analysis, inspiring ideas***