

THE OLDER GENERATION AND
THE EUROPEAN INFORMATION SOCIETY:
ACCESS TO THE INFORMATION SOCIETY

SECOND PROJECT REPORT

**Inclusion of older people
in the information society:
policies and initiatives in Europe at
EU and national level and in the USA**

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1 Introduction

This report is the second report produced within the framework of the Older Generation and the European Information Society: Access to the Information Society (AOP-IS) project. The project has the financial support of the European Commission's Information Society Project Office (ISPO) and the Dutch VSB Fund. It covers in particular six EU Member States - Finland, France, Germany, the Netherlands, Spain and the UK.

The first project report entitled the 'Current Barriers for Older People in Accessing the Information Society' was produced in September 1998. It included the results of six country reports produced for the project. It assessed the problems of access of older people in terms of access to the technical infrastructure, costs, media and computer literacy and content. The main results were:

- Only a small proportion of older people (defined as the 55+ age group) in Europe have experience of and access to ICT (Information and Communication Technologies), less than any other age group.
- This level of access varies between the different countries and depends on economic status, educational level and gender.

The principal barriers identified were:

- Cost - older people are typically the lowest income group and the cost of the equipment (a PC) and on-line access are prohibitive to many.
- Lack of awareness - older people often do not see any potential benefits for them in accessing new services and do not know of any services that might be of interest or use to them (and very few services are actually targeted at older people).
- Lack of confidence - older people are more likely to be fearful of new technology in general and feel that it will be too difficult for them to use, and they are also more likely to lack confidence in the value and integrity of the content of new services, particularly those accessed by the Internet.
- Language and literacy problems - the majority of Internet services and general computer jargon are in English, and older people outside the UK are less likely to speak English. In addition older people are more likely to have general literacy problems.
- Lack of suitably designed equipment - older people are more likely to have physical disabilities and need access to equipment that is designed to take this into account.

This second report has been compiled based on the findings of six country reports in addition to reports on EU policy and the USA. The purpose of this report is to:

- outline EU and US policy and legislation in this area
- describe legislation, government policy and initiatives in the six countries
- examine non-governmental initiatives and their influence on policy in Europe and the USA
- present the approach taken by industry regarding older people in Europe and the USA.

The main findings of the two project reports will be the basis of the final project report in July 1999. This final report will contain the project conclusions and make recommendations for policy and practical initiatives in the area of older people and ICT. It will also give examples of best practice in this area from the countries involved in the study.

These recommendations will first be discussed in an on-line debate running from April to mid-May 1999. This on-line debate can be accessed at the 'Debate' section at <http://www.MediaAge.net>. All the reports produced within the project are available at the project website at <http://www.eim.de/aop-is/aop-is.htm>

2 Summary

2.1 INTRODUCTION

The main content of this report is contained in the following five chapters. Chapter 3 looks at EU policy, Chapter 4 looks at policy in the USA, Chapter 5 looks at policy and initiatives of the national governments of the six countries covered by the project (Finland, France, Germany, the Netherlands, Spain and the UK), Chapters 6 and 7 look respectively at initiatives undertaken by NGOs and by industry in the six countries and in the USA. This summary provides an overview of the main results and conclusions of the individual chapters. It is not the purpose of this report to make recommendations. These will be included in the final report.

2.2 EU POLICY

The European Union is a supranational institution whose primary objective is to improve the economic position of its Member States. Therefore it is not surprising that its legislation, policies and practical initiatives for building the information society are primarily targeted at improving the European economy and employment. Prior to the 1990s, EU policy in the area had focused on developing new technologies through R&D and on the gradual deregulation and liberalisation of the telecommunications sector.

Interest in the concept of a European information society started in the early 1990s as a consequence of criticism of this purely technological and economic approach and its failure to address social and societal aspects. This resulted in the publication of the first main policy document, the EU Action Plan on the information society, in 1994. The principal role of the EU is seen as creating the regulatory framework, the main plank of which is liberalisation of the telecommunications sector. As a result, the telecommunications market in EU Member States (with certain exceptions) was fully liberalised from 1 January 1998.

Although EU policy aims at the creation of an inclusive European information society, there is very little specific reference to the inclusion of older people. This is partly due to the limited responsibility the EU has in the area of policy on older people and partly due to the economic context of its information society policy.

'Inclusion' in EU policy focuses on young and unemployed people and ensuring that they acquire the necessary skills to work in the information society. Education and training are priorities, but in an employment context. There is also an emphasis on the concept of life-long learning, though this is implicitly defined as working life-long learning. This leaves a policy gap regarding the learning needs of older people who no longer are economically active.

Practical initiatives at EU level and especially in research and development targeted at older people are mainly targeted at both older people and disabled people and are situated in the assistive technology sector.

The liberalisation of the telecommunications sector has yet to bring benefits in terms of reduced charges to all consumer groups, particularly residential users such as older people who make mostly local calls. In terms of access, policies targeted at older people focus on affordability, but only really affordability of the voice telephone service, often in the context of low usage (for example the idea of lower tariffs - typically for the line rental - for low users). While this is an important concept, little consideration is made of developing special tariffs that might encourage older people to make more calls and/or access the information society (for example cheap data calls, or cheaper calls for older people).

2.3 US POLICY

The US telecommunications market was deregulated before the European one, starting with the break-up of AT&T and introduction of competition in the long distance market in 1984 and the introduction of competition in the local market in 1996. However the development of a national strategy on the information society took place at around the same time as within the EU, with the presentation of the National Information Infrastructure (NII) Agenda for Action in 1993. The NII represents the US equivalent of the EU and national action plans and also stressed the importance of the private sector in creating the actual infrastructure, with the government's role seen more as complementing and enhancing these private sector initiatives. In practice there seems to be considerable overlap in the EU and US strategies.

Though the NII did pay attention to people in remote areas and to the equipment and connection of schools and libraries, no specific policy regarding older people was developed. Older people were not mentioned in the NII or the telecommunications reform, although action was taken by the American Association of Retired Persons (AARP) to secure the universal access aspect of the NII and reduced telephone charges for older people on low incomes. To date the main focus of ageing policy has been on serving the basics needs of older people, especially in the areas of nutrition and healthcare services. However the Administration on Aging carries out research programmes that identify the needs of older Americans and has recently expressed an interest in the area of ICT.

A hearing of a special Senate Committee on older people and technology in the summer of 1998 brought together players interested in the sector from government, NGOs and industry but has not resulted in any concrete measures so far.

2.4 NATIONAL LEGISLATIVE BACKGROUND AND POLICIES

Policies on the information society in the different countries overlap considerably. Apart from Spain, all the countries in the study have effectively adopted their own national information society action plan, mirroring to a large extent the EU one. The principal focus is economic, and the role the information society can play in strengthening the national economy and creating jobs. It is quite difficult to differentiate in practice between the approaches of the different countries. This is particularly true as both the development of the action plans and the liberalisation of the telecommunications sector are relatively recent in most of the countries.

After the economy and job creation, another key focus for most of the countries is education. However, the main emphasis is always on schools and initiatives or plans to install computers in schools and ensure Internet access. There is also an emphasis on the concept of life-long learning, though again this is implicitly defined as working life-long learning and focuses on education and training in an employment context.

As was visible in EU policy, more recently most of the national governments have begun to take a more social approach to their information society policies, even in countries such as Finland where the initial approach was very technological and market oriented.

Some policies do mention older people specifically. This is partly due to the fact that all countries covered in the study have ageing populations, and the social and economic impact of demographic change is being increasingly recognised. However consideration of older people in the information society is mostly subsumed within policies targeted at combating social exclusion and there are few concrete ideas of how to secure the inclusion of older people.

With regards to national policy on older people in the different countries, reference has principally been made to them in the past in the context of social policy and in particular social welfare and long term health care. The exception to this is the establishment of the national Forum Info 2000 in Germany, which had a working group specifically dealing with older people in the information society. Though there appears to be an impasse following the drawing up of conclusions and recommendations by this working group it is the only example of clear involvement of government, the IT sector and the ageing sector in this area.

Initiatives to promote the information society among older people have been limited at national level and in some countries these programmes have more often been implemented at regional or local level. At national level, libraries are seen as optimal access points to the Internet for the general public, especially in the Netherlands, the UK and Finland. In most countries advisory bodies have been created to address social and societal issues, typically with a mix of members from the public and private sectors, but it is not clear what impact they will have.

Although all the countries are now responsible for implementing the anti-discrimination clause of the Amsterdam Treaty, it is not yet clear at the moment how anti-discrimination legislation on the grounds of age would apply to access to ICT services.

2.5 NGO INITIATIVES AND POLICY

Not many ageing organisations in Europe have developed a policy on ICT and the involvement of older people nor have they intervened in the development of the national information society policy. Though some have undertaken practical initiatives to start stimulating the use of ICT by older people, most of them have not translated this involvement into a national lobby.

An exception to this is Germany where an Association was created to work on the representation of older people in the information society from the Forum Info 2000 working group (mentioned above). However, it is not clear if and how the recommendations of this working group will be put into practice.

In some countries there does not even seem to be a general ageing lobby to represent older people which is of concern considering the increasing ageing of the populations of all European countries.

In the USA non-profit organisations have been successful in attracting partners from industry to invest in their ICT initiatives for older people. The AARP, the National Council on the Aging and SeniorNet are examples of ageing organisations that have developed broad activities on the Internet. However, none of these organisations have actively been involved in the development of US information society policy.

Apart from the examples of initiatives mentioned in the first report a number of other activities are taking place in the different countries. However, none of them is on a very large scale, or part of a larger structure of development. Some initiatives on an international level are being developed.

2.6 INVOLVEMENT OF INDUSTRY

To date industry in Europe has shown little interest in older people as a market for ICT. There is a general lack of enthusiasm for marketing products and services towards older people, partly for fear of losing existing clients because of the association of the product with older people. There has also been little development of ICT products and services targeted at older people, who are not seen as a potential consumer group in this area, except for care services such as tele-alarms.

However there are a growing number of initiatives involving older people and ICT in which businesses are involved, perhaps demonstrating a growing understanding of the potential impact of demographic change. Most current projects have received some financial, material or in kind support from for instance banks, computer or Internet companies.

However, even though large corporations like Microsoft Corp., IBM and Siemens have supported PC training programmes and other initiatives focusing on older people in Europe, it has always been to a limited degree. This demonstrates the different approach taken by industry in Europe and in the USA where the involvement of industry is much greater. This is partly due to the larger size of the older people market and the greater penetration of the Internet in the US and partly due to the fact that there is more of a culture of involvement of industry in community activities in the US as government involvement is more limited. In most European countries it seems that in the development of initiatives for older people and new technology the government, national or local, is more often a likely partner.

Apart from supporting independent initiatives, some American companies have started their own projects on older people and ICT, for instance the Microsoft Seniors & Technology initiative.

3 EU Policy

3.1 INTRODUCTION

This section outlines the activities of the EU in promoting the information society for older people. It examines the scope of the EU to act in this area and existing policy regarding older people and policy on the information society and to what extent this includes older people. It also looks at EU research programmes and promotional activities relating to older people in the information society.

3.2 POLICY ON OLDER PEOPLE

The constitution of the European Union is in effect its founding Treaty. This defines in which areas the EU has competence to act. The original Treaty (the Treaty of Rome) addressed only economic issues, but has been amended a number of times, most recently in 1997 by the Amsterdam Treaty. Although the range of social issues covered by the Treaty has broadened, EU competence remains limited in this domain. In the field of ageing, legislative competence rests almost exclusively with Member States. In practice this means there is a limited role that the EU can play regarding older people.

The EU started to have an expanded social role from 1974 and in particular from the late 1980s, based principally on the idea of the interdependence of economic and social policy. At the same time, the importance of the ageing society started to become an issue in the European arena. This interest in the issue of ageing was mainly inspired by the image of the 'Demographic bomb' (or 'D-bomb') and dates from the publication by the United Nations in 1982 of a first action programme on ageing populations. This presented a picture of dramatic demographic change and triggered awareness and a more focused approach to policy in this area among EU Member States, particularly as awareness grew of the severe consequences for the age structure of the labour market, the financing and organisation of social protection and the financing and structure of health and care services. Although the EU had no competence in this domain at the time, it was felt that exchange between Member States on how to deal with the challenges of demographic ageing would be useful.

The principal milestones in the development of an EU policy regarding older people are as follows:

- In 1984 a budget line of 600.000 ECU's was first allocated for older people, for research into issues affecting older people, exchange of good practice, conferences and events.
- In 1984 a Directive on equal treatment for men and women in social security schemes¹ was proposed, eventually adopted in August 1986, affecting pensions.
- In December 1989 the Community Charter of Fundamental Social Rights for Workers² was adopted. This mentions older people explicitly, saying that they should have the right to sufficient resources and medical and social assistance. Following the Charter, a first social action programme on behalf of older people was proposed.
- In November 1990³, a first EC Action Programme on behalf of older

1 86/378/EEC: Council Directive of 24 July 1986 on the implementation of the principle of equal treatment for men and women in occupational social security schemes, OJL 225, 12.08.1986 p.40

2 The Community Charter of Fundamental Social Rights for Workers. Office for Official Publications of the EC. Luxembourg. 1990

3 Council Decision of 26 November 1990 on Community action for older people , 91/49/EEC; OJ L 28 of 2.2.91, p.29

people was adopted, following the publication of a Commission Communication on the Elderly⁴ in April 1990. This Action Programme was limited in scope, aiming to stimulate and support the exchange of information and ideas, and promoting co-operation between Member States with respect to issues of ageing. It ran from 1991 - 1993.

- 1993 was the European Year of Older People and Solidarity between the Generations⁵. A Council Declaration of Principles on Older People⁶ was issued at the end of the Year, which established the principle of inter-generational solidarity as the basis for policy development by Member States.
- In July 1994, the Commission published a White Paper on European Social Policy⁷, following a Green Paper⁸ in 1993. The White Paper emphasised the importance of employment and investing in training and education. However it also made specific references to older people and the consequences of an ageing society such as those regarding older women, informal carers and the free movement of retired people.
- The Social Action Programme 1995-1997⁹. This did not include any proposals for specific legislative or other initiatives regarding older people. However it did propose the idea of a second action programme on behalf of older people and the publication of a report on demography. (The Commission proposed this new Action Programme in favour of older people¹⁰ in May 1995, but to date it has still not been adopted).
- The Social Action Programme 1998 - 2000¹¹. Demographic change is mentioned, though mostly in the context of employment and social protection. However it does include the commitment to publish a Communication on issues affecting older people, as part of its contribution to the 1999 United Nations Year 'Towards a society of all ages' (this is expected to be published in Spring 1999). It also talks about maximising the benefits of the information society in promoting employment, equal opportunities and social inclusion, though it does not refer explicitly to older people.

At present, because of the absence of a programme on older people, there is also no legal basis for the existence of a budget line for older people's projects. The Commission's plans to administer the funds allocated to the budget line have been challenged in the European Court of Justice, severely limiting the amount of financial support the Commission can give to such projects.

However, despite all the problems with specific older people's budget lines in some policy areas, attention to age has been integrated from the beginning in others, for instance in the TIDE and COST programmes (see below). Integration of older people's interests is a key element in the Fifth Framework Programme, and in the Information Society Project Office's activities (see below).

Current debate in Europe on the ageing society is focused on the need to mainstream policies. The Amsterdam Treaty offers more opportunities than ever for

4 European Commission, Communication on the Elderly of 24 April 1990 (COM (90) 80)

5 Council Decision on the 1993 European Year (92/440/EEC; OJ L 245 of 26.8.92, p.43)

6 Declaration of Principles of the Council of the European Union and the Ministers for Social Affairs, meeting within the Council of 6 December 1993, 93/C 343/01; OJ C 343 of 21.12.93, p.1

7 European Commission, White Paper 'European Social Policy - A Way Forward for the Union', July 1994

8 The European Commission, Green paper on European social policy. Options for the Union, COM/93/551, 17 November 1993

9 COM(95) 134

10 Proposal for a Council decision on Community support for actions in favour of older people, COM (95) 53, OJ C 115 of 9.5.95, p.14

11 European Commission, Communication on a Social Action Programme 1998 - 2000, COM(98) 259, 29 April 1998

mainstreaming and integrating ageing issues into more general programmes. Policies on, for instance, poverty of older citizens, and different types of exclusion of older people (for instance on the labour market) may be addressed under the new Article 137 on social inclusion. Age discrimination may be addressed in the wider context of the new Article 13, which is intended to prevent all forms of discrimination including discrimination on the grounds of age. All EU Member States are responsible for implementing this anti-discrimination clause.

3.3 EU INFORMATION SOCIETY POLICY

Interest in the idea of a European information society began to develop in the early 1990s. There were two imperatives driving this. The first was technical, arising from increasing digitalisation and the consequent convergence of the telecommunications, information technology and audio-visual media sectors. The second was the political need to find a solution to the problems facing the European economy. It was hoped that the emergence of this information society would increase competitiveness and create jobs.

The strategy of the Community in relation to the development of these new communication technologies has evolved in three stages. In the early 1980s, the focus had been on addressing the development of the new technologies from a purely technical standpoint - thus the development of a number of research programmes. In the latter half of the 1980s, the focus shifted to the liberalisation and harmonisation of the telecommunications sector. Then the beginning of the 1990s saw a shift to the promotion of the information society concept and a greater emphasis on social issues.

The main policy documents are:

The Bangemann Report¹², published in May 1994 by a Task Force headed by Commissioner Martin Bangemann. The report's key points were that the creation of the information society in terms of infrastructure should be the responsibility of the private sector, and that the role of the Community should be to create a stable regulatory environment and to act as a catalyst by promoting the development of new applications and demonstration projects and targeting Community-funded research.

The Commission's Action Plan 'Europe's Way to the Information Society'¹³ published by the European Commission in July 1994. The Action Plan was based to a large extent on the Bangemann Report, whose conclusions and proposals were included. It was divided into four areas: the regulatory and legal framework; networks, basic services, applications and content; social, societal and cultural aspects; and promotion of the information society.

The basis of the legal framework proposed was the need for the creation of a clear and stable regulatory environment to encourage private sector investment. A cornerstone of the policy in this area was the liberalisation of telecommunications infrastructure. In addition a range of areas seen as necessary for promoting the growth of the information society were covered, such as standardisation, interconnection and interoperability, tariff adjustment, financing of universal service, intellectual property rights, and privacy.

¹² Europe and the global information society: Recommendations to the European Council, May 26 1994

¹³ European Commission: Communication to the Council, the European Parliament, the Economic and Social Committee and the Committee of the Regions on Europe's Way to the Information Society, an action plan. COM(94) 47. 19.7.1994

Very few new actions were proposed in the Action Plan, and no new funding. On the policy front, the Bangemann Report gave the Commission the political imperative it needed to push forward on the question of telecommunications infrastructure liberalisation, subsequently leading to the adoption of the legislation setting the date of 1 January 1998 for the full liberalisation of the telecommunications sector within the EU. It also gave the Commission more power with which to push forward with proposals that fell under the umbrella of the Action Plan.

The Commission's Communication on new emerging priorities in the Information Society¹⁴ and Communication on The Implications of the Information Society for European Union Policies¹⁵, both published in July 1996. These reviewed the original Action Plan. The two Communications represent a reorganisation of activities under different headings. There is more emphasis on the social and societal aspects of the information society and the need for global co-ordination, but otherwise the measures proposed are similar to the first Action Plan. Subsequently a Rolling Action Plan¹⁶ was published in November 1996, serving just as a new presentational format of these activities. A revised version was issued on 31 June 1997¹⁷.

3.4 UNIVERSAL SERVICE

While it is not possible to cover all areas of policy included in the Action Plans in this report¹⁸, one area of telecommunications policy that is crucial to the question of access is universal service - the provision of (basic) telecommunications services to all citizens. This has historically been a requirement imposed on the state-owned national telecommunications operators by national governments. The issue of universal service and how to guarantee its provision has been of central concern to the EU in the context of the future competitive environment. Two important issues in the context of this report are the actual definition of the scope of universal service and the question of affordability.

Universal service is included within an area of policy known as Open Network Provision (ONP). The first piece of legislation specifically on universal service was the 1995 ONP Voice Telephony Directive¹⁹, which defined universal service as the provision of a (fixed) voice telephony service including fax and low speed data transmission. This was a minimum requirement and Member States remained free to require additional types of service (such as digital mobile networks or ISDN services). Affordability was mentioned as an objective but was not a legal requirement.

Following on from the Directive a Communication on Universal Service²⁰ published in March 1996 proposed an extension of the scope of universal service, including the creation of an obligation of affordability, to be determined at national level. It also proposed extending the definition of universal service to include access to advanced information services such as the Internet (i.e. data transmission at rates of at least 14.4 kbit/s).

14 The European Commission, 'Communication on the Information Society: From Corfu to Dublin - The new emerging priorities. COM(96) 395', 24 July 1996

15 The European Commission, 'Communication on the Implications of the Information Society for European Union Policies - Preparing the next steps. COM(96) 395', 24 July 1996

16 The European Commission, 'Communication on Europe at the Forefront of the Global Information Society: Rolling Action Plan COM(96) 607', 27 November 1996

17 This has the same document reference at the original Rolling Action Plan, see above

18 A full list of telecommunications legislation is available at the ISPO web site, <http://www.ispo.cec/infosoc/telecompolicy/>

19 European Parliament and Council Directive on the application of ONP to Voice Telephony. 95/62/EC. OJ L 321/6. 30.12.95

20 Communication on Universal service for telecommunications in the perspective of a fully liberalised environment - an essential element of the information society, COM(96) 73 final, 13.03.1996

The Voice Telephony Directive was revised and replaced in February 1998 by a further Directive also known as the ONP Voice Telephony Directive²¹. This Directive does not extend the definition of universal service. It contains the proposed legal requirement for affordability, to be defined at national level, including the requirement of affordability for vulnerable groups, specifically mentioning older people. It also addresses specific tariff provisions such as low-usage schemes and specific conditions for people with special needs.

The Commission also published in February 1998 its first Monitoring Report on Universal Service²², which included a survey of various aspects of the provision of telecommunications service in EU Member States. The report concluded that there was no need at that stage to redefine the legislation regarding the provision of universal service.

3.4.1 Tariffs

Tariffs have always been a feature of ONP. Historically in Europe tariffs were adjusted to meet social objectives (connections, line rentals and local calls were subsidised by above costs long distance and international calls). A key part of Community policy is the rebalancing of tariffs to bring them in line with costs, whilst recognising that this might lead, in the short term at least, to increases in connection charges, line rentals and local call charges. The Commission produced a Communication on tariffs in 1992²³, which set out guidelines for cost orientation and the adjustment of pricing structures, based on the ONP principle that tariffs should be cost-related. In order to ensure that tariffs for local calls did not increase dramatically, this rebalancing of tariffs is taking place gradually. Most Member States have imposed a requirement on their national telecommunications operator restricting the price rises that may be made during the period of rebalancing, typically through a price cap system, where price rises for a service or 'basket' of services are limited to a certain percentage per year.

The Monitoring Report on Universal Service mentioned above also reported on the progress of tariff rebalancing in Member States, showing that costs for line rental and local charges have mainly risen. The table below shows what price cap system exists in the countries in the study and what affordability requirements exist at national level.

21 Directive 98/10/EC of the European Parliament and of the Council of 26 February 1998 on the application of open network provision (ONP) to voice telephony and on universal service for telecommunications in a competitive environment (replacing European Parliament and Council Directive 95/62/EC, 98/10/EC) (OJ L 101, 01.04.1998)

22 European Commission, Communication - First Monitoring Report on Universal Service in the Telecommunications Sector, 25/02/119

23 Communication from the Commission: Towards cost orientation and the adjustment of pricing structures - telecommunications tariffs in the Community, SEC(92) 1050, 15.07.92

3.4.2 Table 1: Retail price regulation, price cap controls and requirements on affordable tariffs

Country	Price cap controls on retail prices	Affordability requirements	How is affordability measured?
D	A price cap system is expected to be introduced on 01/01/1998.	The Telekommunikations-Universaldienstleistungs-verordnung (Regulation on Universal Service Obligation) contains an affordability requirement.	Affordability is measured in accordance with the real price for telecom services which are demanded by an average household outside of towns with more than 100,000 inhabitants.
E	The price cap is based on the sector costs, productivity and CPI.	Yes	No specific criteria
F	France Telecom has two price caps in its contract, one based on basic voice telephony services and one for leased lines.	An affordability requirement is included in the Telecommunications Law of 26/07/1996.	Affordability is measured by comparison of different segments of users and of international standards.
NL	There are two price cap systems for PTT, one for a "total basket" system, including a broad range of services such as voice telephony and telegraph and one for a small user's basket system which includes basic voice telephony and cell-phone services for individuals and small business users. PTT is allowed to raise tariffs in line with the expected increase of the CPI for both the year in question and the subsequent year.	No	No specific criteria
FIN	No price caps	Yes. According to Section 1 of the Telecommunications Act, prices have to be affordable.	No specific criteria
UK	BT's price increases overall for its PSTN basket ²⁴ are limited by the RPI-x 1 formula, where x is a % fixed by OFTEL.	Affordability of basic telecom services remains one of OFTEL's objectives (also confirmed in the Universal Service Statement), which will be ensured by the existing licence conditions on BT.	No specific criteria, but telephony price trends, residential penetration levels and market research results are taken into account.

Source: European Commission, Communication - First Monitoring Report on Universal Service in the Telecommunications Sector, 25/02/119

3.5 THE SOCIAL DIMENSION

As mentioned above, during 1995 there was a clear shift by the Commission to a greater focus on social and societal issues. Two advisory groups to address these issues were created and a number of policy initiatives and support programmes adopted. The key elements were:

- The High Level Group of Experts (HLEG)²⁵ on Social and Societal Aspects of the Information Society, created in 1995. The Group comprised of fourteen experts, principally academics. It published its interim 'First Reflections Report' in January 1996²⁶. The report contains over 100 initial policy suggestions

24 The basket contains e.g.: residential and business exchange line rentals; light user scheme, connection charges, take-over charges, local-, regional-, national and international direct dialled calls

25 <http://www.ispo.cec.be/hleg/>

26 Building the European Information Society for Us All, First Reflections of the High Level Group of Experts, Interim Report, January 1996

and argues in favour of a European Model of the information society based on a strong ethos of solidarity. It argues that there is a need to ensure that social cohesion issues are taken into account, and to avoid the creation of new groups of excluded people. The report called specifically for greater attention to be paid to the inclusion of older people in the information society²⁷. The HLEG produced its final report in April 1997. This refers to older people in the context of employment and training.

- The Information Society Forum (ISF)²⁸, set up in July 1995. Its role is to act as a think tank for the Commission on the social and societal aspects of the information society. It has over 100 members drawn from different public and private sector activities. It has produced two annual reports, the first of which was published in June 1996²⁹ and the second in 1997³⁰. The first Report argued that no-one should be excluded from the information society and that access to the information society should be equally available to disadvantaged groups³¹. The second report argues that the Commission and Member States should develop a separate public information policy for the range of public services to enable participation in the information society by the 'information poor', mentioning specifically disabled people. It suggests that most often this will mean using traditional public funding.

- The Green Paper 'People First'³² addressing the social and societal aspects of the information society, published in July 1996. It focused on the three themes of working, employment and cohesion in the information society. The Green Paper was criticised for its focus on primarily economic issues rather than the human dimension.

- The Communication on The social and labour market dimension of the Information Society³³ published in July 1997. The Communication was again criticised for continuing to focus primarily on employment and economic issues rather than the social dimension of the information society³⁴. However, the Communication does say that raising ICT awareness among older people is becoming increasingly important. It also calls for the promotion of access and full integration of people with disabilities in the information society, but does not refer to older people specifically in the same context. In terms of access in general, the Communication argues for the promotion of availability, affordability, accessibility and awareness of the information society.

3.6 EU RESEARCH PROGRAMMES

The research and development activities of the EU are grouped under a chronological series of Framework Programmes. The current programme, the Fourth Framework Programme³⁵, runs from 1994-1998, and will be superseded in

27 European Commission. Building a European Information Society for us all. First Reflections of the High Level Group of Experts, Interim Report January 1996

28 <http://www.ispo.cec.be/infoforum/isf.html>

29 "Networks for People and their Communities - Making the Most of the Information Society in the European Union" First Annual Report from the Information Society Forum, June 1996

30 <http://www.ispo.cec.be/infoforum/documents/ann-rep-97.htm>

31 European Commission, Networks for People and their Communities. Making the most of the information society in the European Union, Luxembourg 1997, p. 21

32 European Commission: Green Paper on Living and working in the Information Society: People first. COM(96) 389. 24.7.1996

33 European Commission, Communication on the social and labour market dimension of the Information Society: 'People First - The Next Steps', COM(97) 390 of 23.07.1997

34 See for example Eurolink Age: Eurolink Age Position Paper on the European Commission's Communication on the the social and labour market dimension of the Information Society: 'People First - The Next Steps' (COM(97) 390 final)

35 For information on the Fourth Framework Programme see <http://europa.eu.int/comm/dg12/fp4.html>

January 1999 by the Fifth Framework Programme³⁶ which will run until 2002. Each framework programme itself contains a number of separate research programmes, and those programmes which have run up to the present date with some activity relevant to older people and ICT are mentioned below:

The RACE (Research in Advanced Communications in Europe), and ACTS (Advanced Communication Technologies and Services) programmes focus on the development of broadband networks and include a very small number of projects regarding older people. These projects have mainly considered older people together with people with disabilities, with the emphasis on defining the needs of these two groups with respect to the design of broadband networks. The technologies and services involved are principally targeted at older people with impairments (such as hearing and visual impairments).

The ESPRIT (European Strategic Programme of Research in Information Technology) programme again includes only a small number of projects concerning older people, and those that do consider both older people and people with disabilities. The focus is also on developing technologies to meet the needs of users with disabilities or impairments.

The Telematic Applications Programme focuses on the societal applications of information and/or communication technologies. It supports a project called INCLUDE (Inclusion of Disabled and Elderly people in telematics). The objective of the project is to support projects within the Telematics Applications programme to ensure that telematics equipment and services are designed and implemented in ways that are accessible to disabled and older people³⁷. INCLUDE puts the emphasis on considering the needs of disabled and older people early in the development of new services and the Design for All approach.

The Telematic Applications Programme also includes a specific initiative relating to older and disabled people and technology called TIDE (Community Technology Initiative for Disabled and Elderly people). This initiative represents the most important area of Community R&D activity relating to older people and new technologies. In practice TIDE focuses primarily on people with disabilities, and older people are addressed only in the sense of being people with disabilities. Telecommunications and ICT are covered mainly in the context of assistive technology.

The TSER (Targeted Socio-Economic Research programme) supports one activity relevant to older people, called ETAN (European Technology Assessment Network). The purpose of ETAN is to promote communication and debate at the European level between policy researchers and policy makers on important science and technology policy issues. One of the topics addressed is titled 'Ageing population and technology: challenges and opportunities'. A working paper was published in February 1998³⁸, subsequently endorsed by DGXII.

Co-operation with third countries and international organisations includes a programme called COST (Co-operation Européenne dans le domaine de la Recherche Scientifique et Technique) which supports research co-operation between the EU countries and other European countries. Two COST actions relate specifically to older people:

36 For information on the Fifth Framework Programme see <http://europa.eu.int/comm/dg12/fp5.html>

37 See <http://www.stakes.fi/include/>

38 Available at <http://www.cordis.lu/etan/src/document.htm>

COST 219 - Future Telecommunications and Tele-Informatics Facilities for Disabled and Elderly People. COST 219 has particularly focused on the needs of older people and people with disabilities relating to ICT and has produced a number of publications³⁹.

COST A5 - Ageing and Technology. This aims to explore conditions for extending autonomy, independence and activity for older people in a European comparative perspective.

Two further actions also have relevance to older people and new technologies:

COST A4 - Social Shaping of Technology. This looks at the way that technological developments are influenced by their social context.

COST 248 The Future European Telecommunications User. The objective of the Action was to study different aspects of the residential telecom user's attitudes, behaviour and perception with regard to telecom services and products.

The Fifth Framework Programme (1998-2002) is structured around four Activities, one of which is called IST (User-friendly information society). Within this activity there is a key action on Systems and Services for the Citizens, which has five priorities, one of which is called 'Elderly and disabled'.

Another activity is called Improving the Quality of Life and Management of Living Resources, which has a key action on 'The ageing population and disabilities' which aims to extend the quality of life and independence of older people, and to reduce the need for long-term care and its consequential costs.

A further EU programme of interest is the SOCRATES programme. This is not an R&D programme but an action programme in the field of education, covering the period 1995-1999, and has a section called ERASMUS focusing on higher education. One of the activities that can be funded under ERASMUS is the creation of thematic networks, and recently a thematic network called GENIE has been established focusing on the promotion of gerontechnology education⁴⁰.

3.7 OTHER EU INITIATIVES

The Commission supports many activities promoting the information society, and established an Information Society Project Office (ISPO) to support these activities. The ISPO website⁴¹ provides information on EU policy and legislation and support initiatives as well as information on calls for tender and links to many other related activities. It manages the Multi-annual programme to stimulate the establishment of the information society in Europe, which funds studies and promotional activities. One project funded through this programme is the PROMISE project⁴², which aimed at the inclusion of older people and disabled people in the information society.

39 See <http://www.stakes.fi/cost219/>

40 <http://www.tue.nl/gerontechnologie/edu/genie>

41 <http://www.ispo.cec.be/>

42 <http://www.stakes.fi/promise/>

3.8 CONCLUSIONS

Although policy on the information society at EU level includes the objective of creating an inclusive information society, this is secondary to the fundamental economic objective. The limited responsibility of the EU in the area of older people means also a limited role in addressing the question of participation of older people in the information society. It cannot actually introduce legislation but must focus on stimulating debate and promotional activities.

The focus of interest in terms of the creation of an inclusive information society is primarily education, with older people mentioned among one of a number of (potentially) disadvantaged groups. The policies on education and training do not take into account the needs of older people. In particular, the concept of life-long learning does not extend beyond working life.

Where older people are considered this is most often together with people with disabilities; because of this, older people are most often considered in the context of assistive technology. Very little attention is paid to the content of new services that might be of interest to older people or to older people as a consumer group for ICT.

In terms of access, policies targeted at older people focus on affordability, but only really affordability of the voice telephone service, often in the context of low usage (for example the idea of lower tariffs - typically for the line rental - for low users). While this is an important concept, little consideration is made of developing special tariffs to encourage older people to make more calls and/or access the information society (for example cheap data calls, or cheaper calls for older people). Liberalisation of the telecommunications sector has yet to be of real benefit to residential users who make mostly local calls, such as many older people, nor to anyone accessing the Internet.

4 USA Policy

4.1 BACKGROUND

In the Constitution of the United States of America of 1787, there appears to be no reference to equality or anti-discrimination legislation⁴³. In 1972 an Amendment to the Bill of Rights of 1789⁴⁴, which would have ensured equal rights for men and women was proposed. However this Amendment expired unratified in 1982.

In response to the growing number of older people and their diverse needs, the Older Americans Act was introduced in 1965⁴⁵ and calls for a range of programmes that offer services and opportunities for older Americans, especially those at risk of losing their independence. The Act established the Administration on Aging (AoA), an agency of the U.S. Department of Health and Human Services, which is headed by the Assistant Secretary for Aging. AoA works closely with its nation-wide network of regional offices and State and Area Agencies on Aging to plan, co-ordinate, and develop in-home and community-level services that meet the needs of older people and their caregivers. These services include nutrition, transportation, senior centres and health care services. The AoA also funds research programmes that identify the needs of older Americans. To date none of their programmes have focused on older people and technology, however in recent months the Assistant Secretary for Aging has stated that in order to prepare America for its longevity, ICT is necessary to modernise services and programmes for older Americans.

At present there is no policy relating to older people and technology at the federal level. At State and local level more interest is shown, depending on local policies. These policies often are targeted primarily at disabled people, though some older people may also benefit from them.

Nevertheless interest is growing in this area and the Senate Special Committee on Aging held a hearing in July 1998 in Washington, DC to discuss usage by older Americans of the Internet. The hearing showed that older people across the USA are fascinated by the Internet and are capable of learning about it. Those present at this hearing included representatives from SeniorNet, Microsoft and ThirdAge Media. The hearing concluded that the Internet is a 'doorway of discovery'⁴⁶, providing a wealth of information on topics much wider than ever before available. However the hearing also concluded that for many older Americans, the door remained closed due to lack of information or lack of access.

Additional legislation worth mentioning is the Americans with Disabilities Act of 1990 which prohibits discrimination on the basis of disability in employment, programmes and services provided by State and local governments, goods and services provided by private companies and in commercial facilities⁴⁷.

In 1986 a new provision was included in the reauthorisation of the Federal Rehabilitation Act which focuses upon assistive technology access in Federal employment. This provision, Section 508 of the Rehabilitation Act⁴⁸, specified that Federal agencies should require that equipment purchased by them be accessible to and usable by people with disabilities. The requirements covering accessibility were modified by the 1992 Rehabilitation Act Amendments and Section 508, codified at

43 <http://Constitution.by.net/uSA/IndexConstitution.html>

44 <http://Constitution.by.net/uSA/AfterTenAmds.html#amd1972.1>

45 <http://www.aoa.dhhs.gov/aoa/pages/aoafact.html>

46 SeniorNet Newslines - Summer/Fall 1998, pg. 6

47 <http://www.usdoj.gov/crt/ada/adahom1.htm>

48 <http://www.ucpa.org/html/innovative/atfsc/fedwork.html>

29 USC Sec. 794d, outlines Electronic and Information Technology Accessibility Guidelines.

Therefore these acts have been bringing accessibility issues to the forefront over recent years and as a result the design of hardware and software has now become more accessible to all and not just disabled people.

4.2 GOVERNMENT POLICY ON DEVELOPING THE INFORMATION SOCIETY

Regarding the development of the information society in the USA, two aspects must be examined: the deregulation of the telecommunications market and the introduction of information society policy covering the 'National Information Infrastructure' (NII).

4.2.1 Telecommunications liberalisation in the USA

Deregulation of the telecommunications market in the USA took place in two phases⁴⁹. The first phase in 1984 saw the separation of the long-distance and local calls market, the liberalisation of the long-distance market and the break-up of the monopoly telecommunications operator AT&T. The second phase in 1996 saw the introduction of the Telecommunications Act and the liberalisation of the local calls market. As a result of the 1984 deregulation, AT&T ('Mother Bell'), was separated from its local call operations which were divided into seven regional telephone companies known as 'Baby Bells'. AT&T continued as a long-distance calls provider competing with a number of new entrants such as MCI and Sprint. However AT&T was excluded from the local calls market. The Baby Bells were excluded from the long-distance calls market but had a monopoly in the local calls market.

The objective of the Telecommunications Act 1996 was to introduce competition in the local calls market and lift the restrictions preventing the Baby Bells from entering the long-distance calls market. It also lifted the restrictions preventing cable and telephone companies from entering each others' business.

4.2.2 Tariffs

In the USA regulation has required that the access line and local calls are offered as a bundle and that this bundle is priced below costs⁵⁰. The monthly charge for the access line and the unlimited local calls does not cover the costs as a private household pays a monthly charge of \$20 - \$25⁵¹ (€17.35 - €21.68) for local service. In order to cover these costs, the access charges for long-distance providers to the local networks are regulated and priced significantly above costs. The long-distance carriers must have access to both the local networks where the long-distance call is originated and where it is terminated. Thus the long-distance calls are subsidising the local calls and this makes it possible for the local telephone companies to cover the cost of their local service. Therefore local calls are offered below costs and long-distance calls are charged above costs in the USA.

Internet users in America benefit from this price regulation, as they do not pay call charges for Internet calls and only have to pay a monthly fee to the Internet Service Provider (ISP). When comparing this to Internet access in Europe, it must be remembered that call charges must be paid for Internet calls as for all local calls in addition to the monthly fee payable to the ISP.

49 European Communication Council : Die Internet-Ökonomie, Strategien für die digitale Wirtschaft, Springer Verlag Berlin Heidelberg, 1999, pp. 73-75

50 Telecommunications Policy, Vol.22, No. 9, 1998, Rudolf Pospischil, 'Fast Internet' pp. 750-751

51 FCC, Reference Book of Rates, Price Indices and Household Expenditures for Telephony Service, Washington, DC, March 1997, pg. 1. The last available average monthly charge was \$19.98 as of October 1995. In the meantime the charge should have increased and ranges somewhere between \$20 and \$25 per month.

4.2.3 Information society Policy

The idea of a 'National Information Infrastructure' (NII)⁵² was first outlined in the USA in September 1993 by the Information Infrastructure Task Force (IITF), a high level group set up by President Clinton and Vice President Al Gore to co-ordinate the Federal Government's activities. The NII Agenda for Action in 1993 emphasised the government-private sector partnership and the leading role of the private sector in the development of the National Information Infrastructure. However it also stated that the government has an essential role to play and that it should complement and enhance the benefits of these private sector initiatives. The areas addressed in the NII initiative include the promotion of private sector investment and the concept of 'universal service' to ensure that information resources are available to all at affordable prices. It also makes reference to information security, protection of intellectual property rights, co-ordination with other levels of government and with other nations and access to government information.

The concept of a universal infrastructure that will allow everybody to get information from anywhere at any time is very popular among the Americans. Therefore from the beginning the NII initiative emphasised benefits for all Americans and stressed a broad concept of universal service and public access. However the policy made no specific reference to older people and their access to ICT. Only the American Association of Retired Persons (AARP) intervened at that time to secure the universal access aspect and reduced telecom fees for older people with low incomes.

In a speech at the International Telecommunications Union (ITU) in 1994, Vice President Al Gore called for world wide co-operation to extend the project of the NII to a Global Information Infrastructure (GII)⁵³. This proposal was later endorsed at a meeting of ministers from the G-7 group of leading industrialised countries. The GII is regarded as a key element of economic development and industrial policy in many developed countries as it creates opportunities for reaching international markets.

4.2.4 Government programmes/initiatives to promote the information society

One of the most important government programmes to promote the development of the information society in the USA is the Telecommunications and Information Infrastructure Assistance Programme (TIIAP)⁵⁴, which was developed by the IITF in 1994. This programme provides grants to non-profit organisations such as schools, libraries, hospitals, public safety entities, and state and local governments. TIIAP grants play an important role by demonstrating the practical applications of new telecommunications and information technologies to serve the public interest and thereby creating an information society for all. Grants are used to fund projects that improve the quality of, and public access to education, health care, public safety, and other community-based services. The grants are used to purchase hardware and software programmes, to train staff and users in ICT applications.

To date a significant portion of the funding has gone to rural regions and rural states, where the focus has been on training and job creation for those living in isolated areas. The programme makes no particular reference to older people.

Research & Development in the area of computing and ICT in the USA is addressed under the 'High Performance Computing and Communications' (HPCC)⁵⁵ initiative. Since 1993 this programme has been expanded to include support for the NII applications and technologies. In October 1996, President

52 <http://www.metalab.unc.edu/nii/NII-Agenda-for-Action.html>

53 http://www.iitf.nist.gov/documents/speeches/032194_gore_giispeech.html

54 <http://www.ntia.doc.gov/otiahome/tiap/>

55 http://www.hpcc.gov/pubs/blue99/exec_summary.html

Clinton announced the launch of the Next Generation Internet (NGI) initiative⁵⁶. This initiative will support research in order to develop and test advanced network technology.

There are no programmes or initiatives at federal level directly targeting older people and ICT. In the USA non-profit organisations such as SeniorNet, the American Association of Retired Persons (AARP) and the National Council on the Aging (NCOA) together with large corporations like Microsoft and IBM are responsible for initiating programmes and organising computer training courses for older Americans.

4.3 CONCLUSIONS

As in Europe, the American national action plan for the information society (NII) stressed the importance of the private sector in achieving its main aims. The government's role is seen more as complementing and enhancing these private sector initiatives. Initiatives co-ordinated at federal level to promote the information society focus on schools, libraries and hospitals. Most of these initiatives target rural regions and the main aim is training and job creation. Older Americans were not mentioned in information society policy or the telecommunications reform, although action was taken by the AARP by securing the universal access aspect of the NII and reduced telecom fees for older people on low incomes.

Though the initial policy to promote de-monopolisation of the telecommunications sector in the US was successful, market pressure has resulted in several mergers and has decreased the number of competing players in the US market considerably.

To date the main focus of ageing policy of the federal Administration on Aging has been on serving the basic needs of older people and especially in the areas of nutrition and healthcare services. Apart from this, the AoA carries out research programmes that identify the needs of older Americans and has recently expressed interest in the area of ICT.

A hearing held by the Senate Special Committee on Aging in July 1998 is an example of how technology and older people is now being put on the agenda for discussion in the USA.

⁵⁶ <http://www.ccic.gov/ngi/>

5 Legislative background and government policy

5.1 INTRODUCTION

In this section a summary is given for each country of the approach taken by the government in developing the information society. This summary is divided into four sections. First, background information is given on anti-discrimination legislation and on general policy regarding older people. Second, government policy documents such as action plans and general legislation on telecommunications and new technologies are outlined, and any specific references to older people highlighted. Third, practical initiatives supported by the government are described, again with particular reference to those of relevance to older people. Fourth, where relevant national R&D programmes concerning older people and ICT are outlined and regional policies and initiatives discussed.

5.2 FINLAND

5.2.1 Background

In Finland fundamental rights are protected by the Constitution, the Fundamental Rights of which guarantee that 'all persons shall be equal before the law', without regard to sex, age, origin, language, religion, conviction, opinion, state of health, disability or any other reason related to the person.

Regarding policy on older people, the most important document is the National Ageing Policy up to 2001 which was published by the Ministry of Social Affairs and Health in December 1995. Key areas addressed are economic developments, the availability of employment and the maintenance of the working and functional abilities of the baby boom generation.

5.2.2 Government policy on developing the information society

Finland was one of the first countries in Europe to liberalise its telecommunications sector, starting in 1985. A national policy regarding the information society was first outlined in a National Information Strategy produced by Sitra, the Finnish National Fund for Research and Development. This was published in 1994 (and a revised version in 1997, see below).

Following the publication of the first strategy, a government position paper was adopted in January 1995, which called for each Ministry to produce its own Action Plan on implementing the strategy. The position paper stated the government's key objective of Finland securing a leading position in the information society by 2000 and set out the key elements of the policy the government hoped would achieve this. The government sees its role as providing a favourable framework for the development of the information society, with finance being the responsibility of the private sector or individual households. The areas the strategy addressed include legislation, R&D, the public sector, network infrastructure, business applications and culture. It also includes training, focusing mainly on schools but also including measures to provide the adult population with basic ICT training through special courses and via libraries. The strategy also aims for all citizens to have access to new ICT and possess the skills to use them, and for the services themselves to be user-friendly.

Two advisory groups were established: the National Committee for Information Society Issues (a public/private sector body) and the National Information Society Forum which supports the Committee's work.

The importance the Finnish government attaches to the information society is further demonstrated in another key policy document, the Government Futures Report, which addresses core issues of Finnish public policy. This was published in two parts, the first in October 1996 and the second in 1997. One of the main topics of the second report is Finland's role as one of the world's leading Information Societies.

The initial National Information Strategy was criticised for being too technologically oriented. This prompted the development of the revised National Information Strategy by SITRA in 1997, which is more people-focused and addresses issues such as how consumers will benefit from the new services in general and how specific groups such as older people will benefit and the usability of services. It also aims to stimulate a wide general debate on values. However, the main focus is on the younger generation and their education.

Although equality before the law is guaranteed by the Constitution as mentioned above, in terms of the information society, this definition of equality seems to work against rather than in favour of older people. A working group appointed by the Ministry of Justice to see whether Finnish legislation needed to be modified in the light of the developing information society decided that it was not necessary, and that the constitutional right to equality means that legislation will not be enacted to favour particular groups such as older people.

Two ministries have been particularly active in promoting the rights of older people, the Ministry of Social Affairs and Health and the Ministry of Education. The latter has produced two documents dealing with the information society: the National Strategy on Education, Training and Research (published in 1995), supplemented a year later by a document titled *Towards a Culture-Oriented Information Society*. The goal of these strategies is to guarantee all citizens equal opportunities in the new information environment. Although most of the proposals again concern children and young people, it is stated that it is important to make ICT available to everyone and that life-long learning should be guaranteed for everyone. One part of this strategy is to develop access in public libraries to ICT and the Internet.

The Ministry of Education has also produced a National Life-long Learning Strategy. However this is mostly work and employment oriented.

5.2.3 Research & Development

STAKES (the National Research and Development Centre for Welfare and Health) has played an active role in several international projects (e.g. COST 219, INCLUDE, PROMISE, Telematics project 1109) which address older people and people with disabilities.

5.2.4 Government programmes/initiatives to promote the information society

The Ministry of Education runs a number of information society related projects, one of which is called 'The House of Knowledge'. This project examines the possibility of distributing electronic mail addresses free of charge via public libraries and co-ordinating public libraries' Internet-related activities.

Another initiative supported by the government in the area of older people is the APC-Seniors project. This pilot project was organised by STAKES, and took

place in 1996-1997. The project focused on teaching basic computer skills to older people and one of the goals of the course was to stimulate and encourage the participants to distribute their new skills to other older adults.

As the APC-Seniors project was such a success, a new programme called the Bridging Project was set up, again by STAKES. The main aim of this project was to provide access to the information society for older people by encouraging older people's homes and service centres to purchase computers, software, Internet and e-mail connections, and by planning new activities for older people's homes, service centres and home service clients based on information technology. There are 15 project partners participating in the Bridging Project and it will continue until the end of 1999. At the beginning IBM donated 15 old computers, Microsoft donated the software and the project partners purchased the Internet and e-mail connections.

5.3 FRANCE

5.3.1 Background

In France fundamental rights are protected by the 1948 Constitution, the 'Préambule' which contains a universal declaration of human and citizen rights saying that all human beings are equal before the law and guaranteeing the same rights to everyone irrespective of religion, race or political opinion. It does not specifically refer to age.

In terms of policy on ageing, the only legislative context in which older people are specifically addressed is with regard to social security (which guarantees a minimum income level) and social assistance (to support those who cannot live independently). The law principally defines the financial obligations of society in terms of solidarity with older people who do not have sufficient resources to look after themselves. Older people are seen as citizens like any others, with the same rights and obligations, and do not have any special rights of access to culture, education or communication.

Government policy on ageing is better reflected in a number of non-legislative plans, mostly targeted at supporting independent living and also establishing the National Gerontology Foundation (Fondation Nationale de Gérontologie).

5.3.2 Government policy on developing the information society

France liberalised its telecommunications sector only recently to meet the EU 1 January 1998 timetable. What legislation exists has therefore emerged only recently and focuses narrowly on the deregulation of the telecommunications sector. In general, French government policy focuses on education, industry and the legal framework.

The government also produced an action plan, through the Interministerial Committee for the Information Society, titled 'Préparer l'entrée de la France dans la société de l'information' (Preparing France for entry into the Information Society), published in January 1998. This focuses on six themes: education; culture; modernisation of public services; industry; innovation; and the creation of effective regulation and a protective framework for new services. There is no specific mention of older people, but there is the stated aim of creating an inclusive information society. However, there are no concrete policies regarding access for disadvantaged groups to ICT.

5.3.3 Government programmes/initiatives to promote the information society

In France there are no initiatives that support access by older people to the information society at national level. Local authorities appear to be the most active in carrying out initiatives that promote the information society.

5.3.4 Research & Development

There are a number of national research programmes targeted at older people. Although most of these have been oriented towards independent living, a multi-annual programme was launched in 1996 on new technologies and ageing. There are three main themes: applications and the interaction between users and technology; the relationship between intermediary organisations, service providers and users; and the actors and the services offered. In 1998 a new study was launched to try and define the role of older people in the socialisation of ICT. A further study is aimed at identifying and understanding the learning process of older people regarding the screen, the keyboard and navigation software.

5.4 GERMANY

5.4.1 Background

Fundamental rights are guaranteed under the German Constitution which says that all citizens are equal before the law and bans discrimination on a number of grounds including race, faith, religious or political views or disability. It does not specifically mention age.

In terms of government policy, reference is made to older people in the so-called coalition agreement of October 1998 between the Social Democrat and Green Parties which forms the political foundation of the new government. Some of the points included are: demographic change requires a corresponding change in the thinking of government, business and society; the government wants to ensure that the opportunities of longer life are realised - society must make better use of the experiences of older retired people (passing on knowledge to the younger generation, building networks, helping in the neighbourhood, etc). There is however no specific reference to new technologies in the context of older people.

The political and administrative system of the Federal Republic of Germany is characterised by the strict application of the principle of subsidiarity. In practice, this leads to a high degree of decentralisation of political responsibilities. For example, legislation on telecommunications is the responsibility of the national parliaments (Bundestag, Bundesrat) while legislation on mass media is the responsibility of the state parliaments (Länderparlamente), and regarding the emergence of the information society both are important. This report concentrates primarily on the national level but includes some examples of regional (state) initiatives.

5.4.2 Government policy on developing the information society

Germany recently fully liberalised its telecommunications sector in accordance with the 1 January 1998 EU timetable. The prime motivation of the national government in developing the information society is to strengthen the competitiveness of the German economy. Its position is that the private sector is the driving force behind the emergence of the information society and the role of government is to develop an appropriate legal framework, again based on market deregulation and liberalisation of the telecommunications sector (an area which is the responsibility of national government).

Government policy on developing the information society is detailed in the Action Plan 'Info 2000 - Germany's Way in the Information Society'. A recent progress report has been produced giving an overview of policy measures and legislation put in place since 1996. The Info 2000 document mirrors in title and content the EU's own Action Plan, however it has an even stronger focus on market issues and less consideration of social issues and the need to ensure participation by all members of society. No consideration was given to any form of anti-discrimination legislation or any form of accessibility support for particular user groups.

The Action Plan focuses on a number of key action lines, including the development of the legal framework, education, supporting R&D and dialogue with industry and other societal groups. This latter action line is of particular interest. A cross-sector group called 'Forum Info 2000' was launched under it as a political and societal platform for discussion of particular aspects of the information society. A number of working groups have been set up by the Forum, including one specifically on Senior Citizens in the Information Society. This working group has made a number of recommendations, including the need for public finance to give older people the opportunity to gain 'real life' experience of new technologies, the need for the requirements of older users to be taken into account in developing applications, the need for services and technologies to be affordable and pricing mechanisms to be transparent and the need for research on how older people can best learn how to use ICT.

5.4.3 Government programmes/initiatives to promote the information society

In summer 1998, the President of the Federal Republic of Germany launched an initiative which aimed at facilitating access of various societal groups to the information society. Under the heading 'Fit für das Informationszeitalter' (Fit for the information century), several projects are being carried out in co-operation with industry. The project 'Ein Leben lang lernen' (Life long learning) is aimed at older people in particular, and in total 300 people in the 60+ age group are entitled to take part in it. This project offers older people the opportunity to communicate via the Internet, e.g. via chat groups. In addition, a hotline will be made available, and an Internet café for older people will be opened in Berlin during the course of the project.

Other initiatives carried out in the context of the working group on Senior Citizens in the Information Society mentioned earlier include a conference which was attended by more than 600 people⁵⁷. The conference focused on various aspects including economic, social and societal issues which relate to the role that older people can play within the emerging information society.

Another initiative organised by the Ministry of Education, Science, Research and Technology (BMBF) was the 'Deutscher Seniorenpreis Multimedia - Vermittlung von Medienkompetenz' (German Senior Citizens Multimedia Award - Transfer of Media Competence). The project selected and supported ten concepts which further the use of multimedia among older people. The awards were presented at the conference in November 1997 and were based on the following requirements: media competence; implementation of virtual meeting places; support of activities in daily life; man machine interface and information exchange.

5.4.4 Research & Development

The Forum Info 2000 mentioned above was funded by the Federal Ministry of Education, Science, Research and Technology. The working group on

57, 'Website, Wissen, Lebensweisheit - Senioren in der Informationsgesellschaft' (Website, knowledge, way of life - senior citizens in the information society) November 1997 in Paderborn, Germany.

Senior Citizens in the Information Society included a number of researchers. The same Ministry also supported Info-Mobil, set up by the VSiW (mentioned in the first report and in Chapter Six below), which apart from travelling around Germany introducing older people to computers and the Internet, also carried out research into the needs of older people and their attitude towards technology.

5.4.5 Regional government initiatives

It is beyond the scope of this report to consider all initiatives and projects at regional level. However some examples include the 'Lifetech' project which has been running for some time in Leipzig, a city situated in one of the new German Länder (Saxony). This project aims at setting up a competence centre under the banner 'senior citizens'. Various companies which develop products and services targeting the 50+ age group will be established within this centre. It plans to offer inter alia telecommunications-based information and care services to the target group. Another project also worth mentioning was also set up in Saxony. In this case a sub-national association of institutions of further education (Verband Sächsischer Bildungsinstitute e.V.) aims at setting up various programmes where pupils teach older people how to use the Internet, using school equipment.

5.5 THE NETHERLANDS

5.5.1 Background

Fundamental rights are guaranteed by Article 1 of the Dutch Constitution which requires equal treatment for everyone in equal situations and forbids discrimination on grounds of religion, political colour, race, sex or on any ground. Age is not mentioned as such but will be incorporated in the phrasing of 'on any ground'.

Policy on older people is the responsibility of a separate directorate within the Ministry of Health, Welfare and Sport. Every four years the directorate issues a policy document, the last of which was called 'Integrated Action Programme on Policy on the Elderly' and covered the period 1995-1998. This document builds on the more general welfare policy document 'According to Ability' covering the same period, which outlines two key aims: encouraging social participation and the promotion of social stability. A new policy document outlining the key factors of the government's policy on this for the next four years is expected in April 1999.

The current policy of the government focuses on:

- encouraging the creation of a framework for older people that enables them to live independently
- full participation in society
- paying special attention to older women and ethnic minorities

The older people's lobby in the Netherlands involves mainly the six older people's unions. They represent today's more vocal older generation which assumes it should continue to play an active role in all aspects of society. An example of a success achieved by this lobby is the abolition of age limits for certain types of insurance.

A National Office on Age Discrimination (LBL) was established in 1994, with the objective of trying to eradicate age discrimination (against both young and older people). This Office was very supportive of the inclusion of age in the anti-discrimination clause of the Amsterdam Treaty.

In general, Dutch government policy on older people focuses either on those still in employment and therefore contributing to the economy or refers to them in the context of healthcare and social welfare. In principle Dutch government policy is targeted at the whole of the population, and additional policy is only developed when considered necessary for vulnerable or socially marginalised groups such as older people.

5.5.2 Government policy on developing the information society

The Dutch government's approach to developing the information society has focused on the potential economic benefits. The telecommunications sector has only recently been liberalised in the Netherlands, to meet the 1 January 1998 EU timetable. Beside economic development, the main focus of the government's policy is education.

As in other countries the Dutch government also produced its own Action Plan, called the National Action Plan Electronic Highway (NAP), in 1994. The main action lines were the liberalisation of the telecommunications infrastructure and telecommunications and media services, however there was also an action line on the definition of the public role. This addressed four areas: the future of public service broadcasting; access to government information and services; the role of public libraries; and stimulation of the use of ICT in education (focusing primarily on schools).

The NAP was revised in 1998, and more explicitly defined three key tasks of the government: creating the legal and societal frameworks by guaranteeing a number of fundamental values and standards of a democratic society in an electronic environment; stimulating innovation and new projects; and ensuring social integration.

The government has recently adopted five new action lines, and does specifically mention older people in the context of one of these action lines titled Knowledge and Accessibility. It recognises that older people in general lack the necessary skills to use ICT, and proposes to hold introductory training sessions in libraries, one of the target groups for which is older people. It also relies on libraries to provide access to the information society for those without the financial means to do so at home. Money is being provided from the NAP for each library to have at least one Internet PC and for the training of staff. One specific reason for this is that the government wants increasingly to disseminate information electronically, and therefore needs to ensure universal access to it.

The government also created an advisory body, the Temporary Commission on Information Policy (TCI) in January 1997, which operated for a year and produced a report on the general range and reach of information services and the government's responsibilities. The TCI believed that the government should in general be aware of the social and cultural consequences of ICT developments, and also saw public libraries as very important in terms of providing public access. Regarding older people specifically, the TCI expressed concern about the effectiveness of current initiatives because of lack of co-ordination and called for further research into the possibility of increasing their quality of life through the use of ICT. Apart from the promotion of libraries to function as public access places there are no concrete actions resulting from the recommendations of this Commission.

The government is currently developing a new policy for the older citizen and the ageing society, in which technology is considered an important aspect.

5.5.3 Government programmes/initiatives to promote the information society

General initiatives to promote the information society at national level in the Netherlands have concentrated on businesses (especially small and medium enterprises), schools and public libraries.

The Dutch Rathenau Institute in the Hague concluded their study on the possibilities of exclusion of older people by the more frequent use of ICT with a one-day conference. This conference, held in April 1998, was attended by the Dutch Prime Minister and several government officials. Contrary to the encompassing nature of the printed report of the study, the conference seemed to focus purely on the increased employability of people in their forties as a result of learning how to use ICT. The advantages of older people actively participating in the information society were not considered a priority.

Similar criticism was given to the Life Long Learning Programme which was launched in early 1998 by the Ministry of Education, Culture and Science. This government paper focused on the educational opportunities for working people while implicitly defining 'life-long' as up until the end of working life and neglecting the educational needs of older people after retirement.

5.5.4 Research & Development

In 1995, the Ministry of Welfare, Health and Sports, in co-operation with the Ministry of Economic Affairs and the Ministry of Housing, Regional Development and the Environment, set up the 'Elderly Technology' project. This three year project had subsidies totalling 1.4 million ECU and was aimed at the greater familiarisation of older people with ICT. An important component of the project was the stimulation of the corporate sector to develop ICT-related products and services for older people, with the emphasis on usability. The project concluded in November 1998 and most of the manufacturers who have included older people in the design and testing of their new products were very enthusiastic about it. However only a few of the supported projects actually led to the introduction of a product on the market which was rather disappointing.

5.6 SPAIN

5.6.1 Background

The Spanish constitution dates from 1978 following the death of Franco and is based on non-discriminatory social policies, the objective being to introduce a level of social equality and protection. It contains a number of clauses of general relevance to older people, guaranteeing equality of the individual and equality before the law, banning discrimination on a number of grounds, and though not actually mentioning age does include the grounds of personal or social conditions or circumstances. It also requires the authorities to implement a policy for the social welfare of people with disabilities. Specifically mentioning older people, the Constitution requires the provision of sufficient financial resources for older people and the promotion of older citizens' welfare.

A National Gerontological Plan was developed by the National Institute of Social Services (INSERSO - now IMSERSO) in 1991. The Plan was developed under the auspices of the Spanish Socialist Party with the objective of correcting social inequalities and actively integrating disadvantaged social groups. It was intended to reorient social policy targeted at older people away from a social welfare and paternalistic approach. Specific aims of the Plan are to provide adequate social servi-

ces for older people, to facilitate access of older people to cultural facilities and to encourage creative use of their leisure time and to increase the social integration of older people.

5.6.2 Government policy on developing the information society

Spain has only recently liberalised its telecommunications sector to meet the EU 1 January 1998 timetable. It is one of the few Member States not to have produced its own Action Plan or similar document. There is a less stridently economic approach than in some of the other countries in the study, though schools are again a key focus of government policy, with a number of initiatives to give them computers and on-line access. The principal pieces of legislation relate to the liberalisation of the telecommunications sector.

There are a number of autonomous regional governments in Spain, which have the power to adopt their own policies and carry out initiatives, and some of these are mentioned in section 5.6.5 below.

5.6.3 Government programmes/initiatives to promote the information society

A number of initiatives promoting the information society at national level in Spain have focused on installing computers in schools, but there has not been a focus at national level on older people.

5.6.4 Research & Development

In addition, specifically regarding older people, INSERSO has been focusing on the possibilities of ICT in terms of helping to improve the quality of life and possibilities for independent living of older people since the early 1990s, and a Specific Programme for Rehabilitation and Communication Technologies is in the Third National R&D Plan. This included the HÁBITAT project, which was mentioned in the first project report, which tries to improve the living conditions of older and disabled people by integrating different telematics systems.

5.6.5 Regional government initiatives

The government in the autonomous region of Catalonia has focused attention on the development of the information society in the region. In May 1998 a Commissioner for the Information Society was created, with the role of promoting and assisting in the creation of telecommunications infrastructure in the region, promoting the introduction of ICT in education, raising awareness, promoting the emergence of companies providing new services and content and promoting the use of telematics within the regional government.

Educational programmes in Catalonia, again focusing on primary and secondary schools, include the HORIZONS and ARGO projects.

Another of the autonomous governments, in Valencia, is participating in the INFOVILLE Project which involves five European countries. INFOVILLE is a Digital Cities project which will provide people at different sites with on-line access to a wide range of information and services directly from terminals in the home, the office or from public information kiosks and information points. Under the umbrella of the INFOVILLE project there is an INFOSENIOR Project at the Senior's Club in Valencia.

5.7 UK

5.7.1 Background

The UK doesn't have a written constitution and there is no single piece of anti-discrimination legislation, but a number of separate Acts of Parliament forbidding specific types of discrimination, such as the Sex Discrimination Act 1986 and the Equal Pay Act 1984. There is no legislation explicitly banning discrimination on the grounds of age. The Disability Discrimination Act 1995 covers those older people who are disabled, but while it is a powerful Act does not cover the majority of older people who are not disabled.

The implications of an ageing population are being increasingly taken into account in developing legislation, but from the narrow perspectives of for example, employment and long term healthcare. The government set up a project called 'Action on Age' in May 1997 to look at old age and employment. Following a public consultation a ministerial paper was published in October 1998 and the government has said that action on older people will be a key priority. A voluntary code of conduct has been introduced for employers to prevent discrimination against older people looking for work.

5.7.2 Government policy on developing the information society

The UK liberalised its telecommunications sector well in advance of the EU requirements, starting in 1982. This was more a result of the then Conservative government's general policy of privatising state-owned utilities and introducing competition rather than a result of a policy targeted at developing the information society, the concept of which hardly existed in Europe at the time.

The Telecommunications Act 1984, which formed the basis of the UK's liberalised telecommunications environment, required the promotion of consumer interests, specifically mentioning people of 'pensionable age' together with people with disabilities. In practice this means that BT is obliged to provide certain services for older people and people with disabilities, which are mainly relevant to people with disabilities but also include special user rebates and priority fault repair.

More recently the current Labour Government has developed a strategy for promoting the development of the information society in the UK, which rather than consisting of a legislative programme consists of a number of initiatives grouped under the general umbrella of 'IT for All'.

In addition a number of consultative documents have been produced by government departments. Among these, the Department of Trade and Industry has produced a report titled 'Converging Technologies: Consequences for the New Knowledge Driven Economy'. This report suggests that universal access to the Internet should be obtained through community centres on the grounds that universal access from home will not be economically practicable, and calls for a debate on how to obtain, monitor and fund universal service access to the Internet.

5.7.4 Government programmes/initiatives to promote the information society

Since 1995 the Labour Government has launched a number of initiatives connected to the information society, under a general umbrella of the Information Society Initiative. The majority of these initiatives have been in the area of schools, businesses and public libraries. A task force which advises central government on the use of advanced communications in government has also been established. Initiatives promoting the information society among older people in the UK have

taken place more at local level rather than at national level. Examples of some of these initiatives are described in the following chapter.

It is interesting to note that the current Labour Government in the UK is considering abolishing the current TV licence fee which amounts to £100.00 (€143.47) per year for the 65+ age group in Britain and allowing them to watch free TV. However a final decision on this matter is not expected to be taken before the last half of 1999.

5.8 CONCLUSIONS

Although all of the countries involved in the study apart from the UK have some kind of constitutional guarantee of fundamental rights, discrimination on the grounds of age is only explicitly banned in Finland. All the countries are now responsible for implementing the anti-discrimination clause of the Amsterdam Treaty, though it is not clear at the moment how anti-discrimination legislation on the grounds of age would apply to ICT services. In the Netherlands for example this question has been considered and it has been decided that for the present, inability to access such services is not detrimental to quality of life.

With regards to national policy on older people in the different countries, reference has principally been made to them in the past in the context of social policy and in particular regarding social welfare and long term health care.

In terms of policy on the information society, the policies of the different countries overlap considerably. All the countries except Spain have produced some sort of Action Plan or strategy document outlining government policy on promoting the development of the information society. These mirror to a large extent the EU Action Plan and were developed after the debate on the information society had begun at European level (as EU Member States it is to be expected that the national strategies would reflect the EU one). The principal focus is economic, and the role the information society can play in strengthening the national economy and creating jobs. The main plank of the regulatory framework is liberalisation of the telecommunications sector.

Another key focus for most of the countries is education. However, the main emphasis is always on schools and initiatives to install computers and ensure Internet access. There is also an almost universal emphasis on life-long learning, though this is, almost without exception, focused on working life-long learning, rarely addressing older adults outside work.

All the current strategies reflect to some extent the increasing interest in the social and societal aspects of the information society and have as an objective the creation of an inclusive information society and access by all citizens to the new services. Some even mention older people specifically. However, there are very few concrete ideas of how these objectives will be secured. Libraries are seen as optimal access points to the Internet for the general public. The creation of advisory bodies, typically with a mix of members from the public and private sectors has also been a common approach to demonstrating an interest in inclusion.

6 Non-governmental and local government initiatives

This chapter describes some of the most interesting initiatives by NGOs and local government aimed at encouraging older people to access the information society which were highlighted in the country reports written for the project. A number of initiatives by NGOs were also outlined in Chapter Six of the first report of this project. NGO and local government initiatives are taken together because they are typically both local in nature and because they are often collaborative, making it difficult to separate the initiatives into distinct sectors. This section also summarises the possibilities that these NGOs have in developing or influencing policy through their initiatives.

6.1 INITIATIVES TARGETED AT ENCOURAGING OLDER PEOPLE TO ACCESS THE INFORMATION SOCIETY

6.1.1 Finland

The Granny's Corner project in Tampere, already described in the first project report, is an example at local level in the area of older people and technology in Finland.

6.1.2 France

Over the past two years local authorities in France have developed a number of new ICT applications for local citizens. However it is not known if any of these applications are particularly targeted at older people.

Cyberpapy.com

The bilingual website *Cyberpapy.com*⁵⁸ offers practical help for college students with questions about their homework. Through web advertisements and e-mail they can communicate with a team of older people who have agreed to help. This intergenerational project was started by the Boulanger Foundation. Boulanger is a large chain of electronics shops in France.

6.1.3 Germany

Apart from the Senior-InfoMobil (mentioned in Chapter Five and in the first project report), the activities of other groups such as SeniorWeb.de and 'Seniorennet' are making progress. The ageing organisations in Germany such as BAGSO and KDA are themselves becoming more active on the Internet and are starting to offer different services for older people.

Seniorennet.de

This voluntary organisation also presents itself as an advocacy organisation to help older people get easier access to the information society. Its roots lie in the city of Munich where in 1996 a small group started online activities for older people, and today five German cities already have active units. Local groups are allowed to include their own homepages and activity lists within the general framework of the *Seniorennet.de* website. Participants in *Seniorennet* are entitled to a reduction on Internet access prices from the provider which is hosting *Seniorennet* and an e-mail address at their domain name.

58 <http://www.cyberpapy.com>

6.1.4 The Netherlands

SeniorWeb

SeniorWeb, which was already described in the first report, will in 1999 expand its activities by trying to set up computer and Internet facilities for older people inside different kinds of older peoples' homes. For the March 1999 Internet Fiësta, Primafoon (the telecom shop of the Dutch PTT-Telecom) has made available 50 I-Mac computers to be used on a permanent basis by residents of 25 older peoples' homes where they will be installed. SeniorWeb will offer guidance, demonstration and training through their network of volunteers and Apple Computers will ensure maintenance of the computers. Hopefully, this initiative will only be the beginning of building larger capacity computer rooms in housing facilities for older people in the Netherlands.

6.1.5 Spain

The Catalan autonomous government launched a plan in March 1998 for the computerisation of non-profit making associations, which also included older people's organisations, and their access to the Internet. The associations may purchase a Pentium 200, a modem, a printer, Microsoft Office 97 and several management software programmes for 181,700 pesetas (€ 1092,00). The programme is carried out in collaboration with Microsoft, Dell and Epson. Special credit facilities have been provided by the bank 'la Caixa' for the associations participating in the project.

The Foundation of 'la Caixa': Caixa d'Estalvis i Pensions de Barcelona, the first Spanish savings bank, is obliged to devote its profit after tax to charitable work. It recently launched two pioneering projects which focus exclusively on older people and technology: the Punt Blau (Blue Point) programme; and computer courses.

Blue Point

The bureaucracy and multiple sources of information that older people face when looking for information relevant to their age group was the main reason for starting the 'Punt Blau' project. The project installs electronic information kiosks in publicly accessible places (bank offices of la Caixa, health centres and town halls), which through a simple touchscreen interface guide the user to the information that they need. Care services, cultural, financial, legal information, leisure time and voluntary work are some of the categories offered at the Punt Blau. In addition there is a specialised telephone directory. Punt Blau also helps people to learn about their entitlements to certain services and where to get them from. The information can be directly printed at the kiosk. The Punt Blau is now installed at 116 places: 40 in the Autonomous Communities of Catalonia, 36 in Madrid, 15 in Castilla-La Mancha, 15 in Castilla-Leon and 10 in Galicia. There is a separate database of information for each region and close contact is maintained with the relevant institutions.

First users' research has revealed that the terminals are quickly becoming popular, especially considering that there has been no marketing campaign as of yet. Users are often men and women under 50 years of age, probably consulting the kiosk for information for their parents or other older relatives. 25% of users are men and women over 60 years old.

Computer Classrooms (Aulas Informaticas)

This project set up by the Fundacio 'la Caixa' in Catalonia involves installing computer classrooms in a large number of senior centres in the different Autonomous Communities and organising courses especially designed in length and methodology for older people. Between March 1997 and December 1998, 4,500 students enrolled in these courses and waiting lists started growing. The average age

of students is 70 years and most of them have only primary school education. Today 41 classes are in operation all over the country.

6.1.6 The UK

COMMA

In the small town of Batley, Yorkshire, a project has successfully involved older people in contributing to building content of new media in the information society. Specially developed software enables a local group of older people to scan photos of their local community and archive them with text, sound clips and other material into a local Community MultiMedia Archive (COMMA). This way the knowledge of older people can be transferred to users of the archive (like schools and libraries), which can be reproduced on CDROM. The project has now expanded to the region around Batley and one has been started in Denmark. Plans are also being made in the Netherlands for starting local COMMA projects.

Age Resource

As the 'younger arm' of Age Concern, Age Resource offers training and information for people who want to know more about education and volunteer opportunities relevant to their age and interests. They provide training and workshops on IT, Internet, e-mail and offer older people access to information via the Internet. For the near future they plan virtual cafes for older people. Many of the Age Resource desks are registered as 'IT for All' learning centres.

There are plans to widen the number of desks and to found access points in Sheltered Housing and pensioner drop-in centres. The Age Resource initiatives rely very much on voluntary workers who beside giving the training and working at information desks also contribute in giving care and personal contact, which is considered just as important in working with older people.

6.1.7 International projects

Presence

Presence is a joint initiative of the Dutch Design Institute, Telenor in Norway, Domus Academy in Milan and the Royal College of Art in London and some other partners. The objective of the project is to find out how design can exploit information and communication technologies to meet new needs. It attempts to develop new ways for designers and older users to work together to create concepts that exploit the imagination of designers while still meeting the needs of the users. Presence tries to stimulate applications that are easy and fun to use and move beyond the 'traditional' screen/keyboard devices.

In the Netherlands a test group was formed by older persons living in the Bijlmer, a suburb of Amsterdam with tall apartment blocks that now house many immigrants, often coming from the former Dutch colony, Surinam. The group launched the idea of using video screens and slide projections in the area to transmit a more positive image of the Bijlmer area. By using pictures and images covering the history and background of the people in the Bijlmer, a connection is made between their current life in the Netherlands and their Surinamese history. Test groups in Milan, Oslo and London are working on other projects trying to 'provoke' innovative ideas and design for new applications for older people.

EuroSeniorWeb

SeniorWeb in the Netherlands has helped groups in Germany, Switzerland and Austria to set up similar national initiatives. SeniorWeb Switzerland has recently won a prize and SeniorWeb Netherlands has been nominated for a prize awarded to innovative websites. The organisations behind these initiatives are currently working on the start of a European co-operative framework in order to further exchange

ideas and experience in working with older people and computers/Internet. A website will be created bringing together the different initiatives in Europe and facilitating the exchange of news in the sector. At the International conference of the European ageing organisation EURAG in Graz in April 1999 a workshop on EuroSeniorWeb will be held in order to further develop ideas.

6.2 DEVELOPMENT OF AND INFLUENCE ON IT POLICY

In Europe it is more the exception than the rule that national information society policy is influenced or targeted by a lobby from older people's organisations.

6.2.1 Finland

The Finnish Committee which drew up the national strategy and policy on ageing in 1995 (which was mentioned earlier) included representatives of several NGOs such as the pensioners' association, the 'Central Union for the Welfare of the Aged' and the 'Association for Old Age and the Neighbour Service'. In addition, this Committee organised hearings to which several other older people's organisations were invited.

As mentioned earlier, the innovative STAKES project APC-Seniors was concluded with the establishment of a new organisation 'Enter ry'. It has established its own website and is due to publish an online magazine but, so far, has not built a strong lobby on information society issues.

6.2.2 France

There does not seem to be a French lobby on access to the information society for older people. In fact the general political lobby of the French ageing organisations does not seem very active. However, French Internet users are organised in a vocal group called 'IRIS', which advocates the non-commercial and transparent growth of the Internet in France, and proposes free hosting of websites of individuals. It organised the first strike of Internet users of the national Wanadoo provider on 13 December 1998 to protest against poor service and high costs.

6.2.3 Germany

An example of quite comprehensive involvement of older people's NGOs in the development of government policy on IT comes from Germany and the working group on Senior citizens in the Information Society set up under Forum Info 2000 already mentioned in Chapter Five. Many of the participants involved in this working group came from different older people's organisations such as BAGSO, KDA, Seniorenbüros and contributed to the establishment of the VSiW, an NGO which explicitly aims at facilitating access of older people to the information society.

6.2.4 The Netherlands

In the Netherlands, SeniorWeb gained substantial government support in order to stimulate access for older people in the information society. However, it has not been so much the older people's organisations themselves that pressed for the participation of older people in the information society. Currently SeniorWeb itself occasionally takes a position in the debate on the development of the Internet in the Netherlands. SeniorWeb commented on a response given by the 'Internet Society Nederland' to the to-be-formed cabinet on the government's plans for the information society in the Netherlands. They stressed the importance of establishing so-called learning centres where anyone can learn about ICT. They underlined the

importance of the adaptation of regulation and tax rates so that access and connection charges for Internet use would decrease. Finally, SeniorWeb supported the proposed goal of the forthcoming government of providing every Dutch citizen with an e-mail address by the end of its governing period (2002).

It is interesting that SeniorWeb not only asked the Ministry of Health, Welfare and Sports for a subsidy (effectively placing itself in the care sector) but also asked other government departments to accept their role in stimulating older people to use new information technologies and the Internet.

Other than this, SeniorWeb participates in the activities of the public libraries in the Netherlands to provide accessible information from the Internet and offer courses on and demonstrations of the Internet especially designed for older people.

The Temporary Commission on Information Policy in the Netherlands did not directly consult societal organisations in its work. In the final report of the commission reference is made to several initiatives taken by different organisations in society but the lack of co-ordination and structure in these were especially criticised.

6.2.5 Spain

In Spain the 'Foro del Club Seniors' was set up providing a forum and platform for the development of people over 50 and a meeting point for all those people and agencies involved in services for older people. In 1998 their first conference was held 'Mayores 1998' which can be seen as a first step towards taking a position in policy making in Spain.

6.2.6 UK

Age Concern in England has a reputation for effectively engaging in politics. However, concerning the position of older people in the information society they have been less visible. Age Concern is now running two debates: a general one on the consequences of the demographic changes in the new millennium and another on the employment prospects for older workers. Other organisations active in the ageing field seem to be less experienced in the influencing of government policies and tend to concentrate on local campaigns instead.

6.3 THE USA

In the United States, access for older people in the information society has not been included in the general IT policy of the federal government. Even though the National Information Infrastructure campaign was one of the first developed information society policies in the world it mainly focused on the implementation of IT technology in the infrastructure of schools and remote areas. The American Association of Retired Persons (AARP), the main American NGO for older people, was solely involved in ensuring the provision of universal access to pensioners with low incomes (as mentioned in Chapter Four). However, the AARP has been very active in stimulating the use of computers by its members. AARP online is offering a wide range of AARP information and services through the World Wide Web. Apart from this AARP has conducted several research studies into the use and benefit of ICT for older people. Since October 1998 they have dedicated several pages of their homepage to computers and technology which are gaining in popularity every day.

Other NGOs involved in older people and technology, for instance SeniorNet, have not been involved in a political lobby but have directed their thoughts and policy ideas mainly at their members and at their (potential) sponsors.

The same counts for the American Society on Aging which does not participate in policy on ageing and technology even though it does agree that participation of older people and their organisations in new technology initiatives is essential. The primary target group of ASA's stimulation however is their member organisations, more as an educator and not so much as a lobbyist.

Another major player in the US ageing field is the National Council on the Aging (NCOA) which has co-operated with Microsoft and Sony in the PC Empowerment Initiative awarding money, hardware and software in order to provide several projects with new or better equipment.

Although there seems to be more interest in the Federal government in the consequences of new ICT in an ageing society and in the facilities it can offer to older people, the current remit and financial position of the Federal Administration on Aging does not include straightforward action in supporting and stimulating projects directly.

6.4 CONCLUSIONS

The involvement of NGOs in the different European countries in their national information society policies has not been evident. We may conclude that Germany is an exception to this through the activity of the working group of the Forum Info 2000. However the practical implications of this working group and the further implementation of the recommendations of the working group are unclear.

It is worrying to see that in some European countries the NGOs for older people have no influence on policy at all. In France it was said very explicitly that French ageing organisations are not active in the political field. Instead they are regarded as 'gentils vieux'; 'nice old people' who do not make a fuss.

7 Industry

7.1 INTRODUCTION

This section looks at the approach taken by industry in developing new services and communication technologies and to what extent the needs of older people have been taken into account. It compares the situation in Europe to what is happening in the USA where partnerships between industry and NGOs active for older people in the field of ICT are more common practice.

7.2 FINLAND

Apart from the sponsorship by Microsoft and IBM of the Bridging project that was already mentioned in Chapter Five, businesses in Finland do not really demonstrate an interest in older people. Large telecommunications companies such as Nokia and Sonera Ltd. are more interested in investing in schools and in training young people on the basis that they represent the labour force of tomorrow.

7.3 FRANCE

In France there appears to be very little interest in this societal group. France Telecom doesn't have a specific marketing approach towards older people and doesn't have any products specifically targeted at older people. This is despite the fact that in 1997, 3.2 billion Minitel transactions were carried out, which is equivalent to the number of Internet transactions carried out in the entire world in the same time period. Minitel still remains the number one ICT application in France today, particularly for older people.

Senioragency is a French advertising agency focusing on the 50+ age group. It is the first agency of this kind in Europe, and has recently opened offices in Brussels and Amsterdam. The agency believes that older people represent a very important market in Europe, but one that has not been addressed until now. Clients of the company include Avis, Renault, Playtex and the RATP (Regie Autonome des Transports Parisiens - the state organisation responsible for public transport in the Paris region). Senioragency worked with the RATP to set up Internet training courses for older Parisians. The courses are held each thursday at 'Le Palais de la Découverte', a museum in Paris. The course itself is free and participants only pay the entrance fee for the museum which amounts to FF 27 (€ 4,12). The courses are organised in co-operation with Compaq, which provides the equipment.

Senioragency set up 'Senior-Planet'⁵⁹, the first website in France which specifically targets older people.

7.4 GERMANY

Older people represent a market segment of growing importance in Germany. However, the approaches taken by the various companies targeting this market segment vary considerably. While some companies try to actively approach older people as a new customer group, e.g. by developing specific products and marketing approaches, others prefer to take a more 'cautious' approach.

59 <http://www.senior-planet.com>

Deutsche Telekom, the national telecommunications operator has recently set up a new marketing department which specifically targets older people. Products offered range from particular equipment such as specifically designed telephone sets, to service offerings, such as an alarm service. In addition, special advertising strategies have been developed. Furthermore Deutsche Telekom plans to offer 'integrated telehome services'⁶⁰ to older people in the coming years. At present, research is being carried out into the design of these services, which include social and medical care services, services supporting the quality of life and raising the level of security at home. In order to introduce these and other services onto the market, it plans to form alliances with partners from the private as well as the public sector and this will include organisations active in the area of health care.

Deutsche Telekom is also involved in the 'Life Long Learning' project which was launched under the initiative of the President of the Federal Republic of Germany, already referred to in Chapter Five of this report.

Other companies also interested in older people in Germany include IBM and Siemens, which are founding members of the VSiW (Association of Older Citizens in the Information Society), which has already been mentioned in Chapter Six of this report. The current activities of the VSiW are partially financed through sponsorship from various firms including IBM, Vobis, Deutsche Telekom, T-online and Microsoft.

7.5 THE NETHERLANDS

Up until now Dutch industry has not been very active in approaching the market for older people and new technologies. KPN Telecom launched its version of WebTV, the Net.Box, at the 50+ trade fair held in October 1998. The Net.Box was partly developed bearing the 50+ consumers market in mind. However it is too early yet to say whether the introduction of the Net.Box in the Netherlands has been a success or not and how popular it has been with older people.

As a follow up to the SeniorWeb special PC package for older people that was mentioned in the first project report, local computer shops in the Netherlands now offer special deals to people participating in a SeniorWeb course. Apart from this, Dixons, a computer retailer offers reductions to members of SeniorWeb's Members Club.

The Dutch 'Rabobank' supports the SeniorWeb Ambassadors project, which established a network of 300 volunteers who are responsible for the organisation of local computer courses for older people. In fact many of the local courses take place in Rabobank buildings and are partly equipped with (old) Rabobank computers. Apart from this all SeniorWeb ambassadors were given Microsoft Home Essentials software by Microsoft Netherlands.

As already mentioned in this chapter, Senioragency recently opened an office in, Amsterdam. This is a joint initiative of Grey Advertising in Amsterdam and Senioragency France. Although the success of this initiative still has to be seen, it at least shows that there is an interest in this area and that marketing strategies are being developed in the Netherlands which target older people.

60 Quadt Hans Peter: Visionen von IuK-Technikanwendungen im Seniorenbereich, in: Erkert & Salomon (1998), pg. 117

7.6 SPAIN

In Spain businesses are beginning to consider the large market represented by the 50+ age group which represents over 12 million people, and who have increasing purchasing power, higher educational levels and higher demands with regard to the services that are provided to them.

JÚBILO COMUNICACIÓN S.L. is a company which broadcasts radio programmes targeting the 50+ age group and offers very attractive advertising rates ranging from 13,000 - 300,000 Pesetas (€ 78-€ 1803).

In Barcelona in November 1998 a conference entitled 'Las nuevas Tecnologías para el cuidado de los mayores en el tercer milenio' (New technologies for older people's health care in the third millennium) was organised by the Iberdrola Institute of Technology. This conference highlighted the growing interest in the area of older people and ICT in Spain.

7.7 THE UK

British Telecom is the main telecommunications supplier charged with universal service in the UK and as mentioned in the first project report has developed a range of telephone sets and tariffs suitable for older people. One of its products, the large button phone Converse, initially designed especially for people with poor vision, has become a best seller.

Recently the mobile phone industry in the UK has also shown signs of interest into the issue of accessibility of mobile communications.

Strong competition between digital television platforms (terrestrial, cable and satellite) which has resulted in lower prices and increased flexibility of subscription television, now available for as little as £7.00 (€10.00) per month, allows more older people on lower incomes to participate in this market.

Manpower, a recruitment consultancy in the UK, offers employees training and advice on how to improve their employment prospects. It offers an assessment and training programme, Skillware, to all its employees and this programme is especially useful to those employees who are trying to return to work after long-term unemployment or illness. Experience has shown that older people often benefit from this scheme as they are trained to use the latest technologies, though employability is the main aim of the scheme.

In the UK a company called Hairnet⁶¹ specialises in the provision of Internet courses for older people. They have set up tailor-made courses for older people in London and also franchise their programmes across the country. Their trainers are aged over 50 years, which they consider to be an essential requirement for allaying the fears of older people in approaching ICT. The courses cost between € 340 and € 480. The Department of Trade and Industry (DTI) uses Hairnet as a show case example for their national awareness campaign 'IT for All'.

7.8 USA

In the USA, partnerships with industry are more common practice for non-profit but also for profit organisations active in introducing older people to ICT. Large corporations in the areas of computers and software e.g. Microsoft Corp., IBM and Sony Corp. and telecommunications companies such as Bell Atlantic, SBC (part of Pacific Bell) and Ameritech (telcom Mid West US), have all supported such initiatives.

61 <http://www.hairnet.org>

Microsoft Corp.

Microsoft has in recent years supported several initiatives by donating software programmes, computer equipment and money. It created its own Microsoft Senior Initiative⁶² in 1998. Employability of older Americans is the key objective of this initiative, which hopes to provide computer literacy training to over one million older Americans by mid-year 2000. The Microsoft Senior Initiative also participates in policy and legislative activities relating to programmes which increase PC literacy of older people and their consequent employability.

Like all other US companies, Microsoft is required by legislation such as the Americans with Disabilities Act and Section 508 of the Rehabilitation Act, to ensure that its products are more accessible to people of all ages. An example of such accessibility features includes the Accessibility Wizard which is new to Windows 98 and for instance enables the user to magnify the font size up to nine times.

WebTV, a Microsoft product, is popular among older Americans, and it has proven to be a good alternative for people who want to send e-mails and surf the web without having to purchase or learn how to use a computer. WebTV has appointed a specialist mature market consultant to promote the product within the older age group and to compile a special guide⁶³ on the benefits of WebTV for older people.

IBM

IBM has also been active in the USA in getting older people involved in new technology. IBM is the single biggest sponsor of the 140 SeniorNet Learning Centres throughout the USA. It also offers discounts on computers to SeniorNet members. It is very interested in diversity issues and also focuses on the needs of the workforce. Its marketing approach is to make new technology accessible to as diverse a group as possible. IBM will shortly launch a new \$ 1,5 million (€1,300,954) grant programme for hardware to be given to projects for people in so-called 'underserved' areas (where the population often includes a high proportion of ethnic minorities), but this will also involve the disabled and ageing sectors.

Commercial websites

In the last two years several commercial websites targeted especially at older people have been in operation. ThirdAge.com⁶⁴ was started by the founder of SeniorNet, Mary Furlong, and now employs a team of 60 people. By continuously researching and measuring increasing traffic on their webpages the company's strategy is to build an online 45+ community attractive to sponsors. IBM, Toys'R'Us, Quaker Oatmeal, Millstone® Coffee, Inc are examples of ThirdAge partners. Other commercial websites for seniors in the US are Senior.com, Microsoft Networks Seniors Community and Seniorline.com.

7.9 CONCLUSIONS

To date industry in Europe has showed little interest in older people as a market for ICT. There is a general lack of enthusiasm for marketing products and services towards older people, partly for fear of losing existing clients because of the association of the product with older people. There has also been little development of ICT products and services targeted at older people, who are not seen as a potential consumer group in this area, except for care services such as tele-alarms. However there are a growing number of initiatives involving older people and ICT

62 <http://www.microsoft.com/seniors>

63 The Benefits of WebTV for Older People Microsoft WebTV 1998.

64 <http://www.thirdage.com>

in which businesses are involved, perhaps demonstrating a growing understanding of the potential impact of demographic change.

Such initiatives have involved a diverse range of companies from different industry sectors, including telecommunications companies, IT companies, banks, and small companies supplying services such as websites and training courses.

However, even though large corporations like Microsoft Corp., IBM and Siemens have supported PC training programmes and other initiatives focusing on older people in Europe, it has always been to a limited degree. This demonstrates the different approach taken by industry in Europe and in the USA. The market size of older people and the further integration of e.g. Internet technology in the USA will have played a role in this as well as the structure of American society, where there is little availability of public money for these types of initiatives. In most European countries it seems that in the development of initiatives for older people and new technology the government, national or local, is more often a likely partner.

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<http://www.handimag.com> (*Online monthly magazine for disabled or older people. Summary and extracts*)
<http://www.senior-planet.com>

Germany

<http://www.bmfsfj.de/>
http://www.empirica.com/a_und_b/
<http://www.forum-info2000.de/>
<http://www.global-learning.de/g-learn/providers/fit/html/projektinfo/infos.html>
<http://www.iid.de/vsiw/index.html>
<http://www.kda.de/>
<http://www.seniorennet.de>
<http://www.seniorennet.de/hamburg/bo.htm>
<http://www.seniorentreff.de/presse/linkarchiv.html>
<http://www.seniorweb.uni-bonn.de/BAGSO/bagsodeu/bagsodeu.htm>
<http://www.uni-ulm.de/LiLL/senior-info-mobil>

The Netherlands

<http://info.minez.nl/docs/nap-en.htm> (*Action Plan NAP Electronische Snelwegen; 'Van metafoor naar actie', December 1994*)
<http://info.minez.nl/docs/twvrtge2.htm> (*Progress Report NAP: Actieprogramma Elektronische Snelwegen, Oktober 1996*)
<http://info.minez.nl/nota/nap/hinx00.htm> (*Herijking Plan NAP Electronische Snelwegen; 'Boven NAP', April 1998*)
<http://info.minez.nl/nota/snelweg/hinx00.htm> (*Action Plan 'Plan van Aanpak Elektronische Snelweg', 'Visie op Versnellen', 8 November 1995*)
<http://info.minez.nl/nota/vrtgsnlw/vrtg0x.htm> (*Progress Report NAP: Actieprogramma Electronische Snelwegen, December 1995*)
<http://info.minez.nl/nota/vrtgsnlw97/hinx00.htm> (*Progress Report NAP: Actieprogramma Elektronische Snelwegen, 1997*)
<http://www.kittz.nl/kittz/ot/gbbegin.htm> (*Elderly Technology*)
<http://www.minez.nl/nota/nap/hinx00.htm>
<http://www.presenceweb.org>
<http://www.seniorweb.nl>
<http://www.tue.nl/gerontechnologie/edu/genie>
<http://www.twinning.com> (*Twinning*)

Spain

<http://www.clubseniors.org>
<http://www.digitalsites.infoville.net>
<http://www.fundacio.lacaixa.es/>
<http://www.gencat.es>
<http://www.seg-social.es/imserso>

The UK

<http://www.ace.org.uk> (*Age Concern*)
<http://www.dfee.gov.uk/age>
<http://www.disability.gov.uk>
<http://www.dti.gov.uk>
<http://www.hairnet.org> (*Hairnet*)
<http://www.oftel.gov.uk> (*Oftel*)
<http://www.polkaville.com>
<http://www.servicefirst.gov.uk>
<http://www.dti.gov/future-unit/> (*Future Unit of the Department for Trade and Industry*)

USA

<http://Constitution.by.net/uSA/AfterTenAmds.html#amd1972>
<http://Constitution.by.net/uSA/IndexConstitution.html>
<http://cyberatlas.internet.com>
<http://www.aarp.org>
<http://www.aoa.dhhs.gov>
<http://www.aoa.dhhs.gov/aoa/pages/aoafact.html>
<http://www.asaging.org>
<http://www.ccic.gov/ngi/>
<http://www.census.gov> (*U.S. Bureau of the Census*)
http://www.hpcc.gov/pubs/blue99/exec_summary.html
http://www.iitf.nist.gov/documents/speeches/032194_gore_giispeech.html
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<http://www.metalab.unc.edu/nii/NII-Agenda-for-Action.html>
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<http://www.microsoft.com/seniors/cleartype.htm>
<http://www.microsoft.com/seniors>
<http://www.ncoa.org>
<http://www.ntia.doc.gov/otiahome/tiiap/>
<http://www.nw.com>
<http://www.oecd.org//dsti/sti/it/prod/ITOUT-97.PDF> (*OECD: Information Technology Outlook*)
<http://www.seniornet.org> (especially: SeniorNet Newline - Summer/Fall 1998)
<http://www.seniornet.org/research/survey1.html> (*survey by Richard Adler, on older adults and computers*)
http://www.technologylaw.com/techlaw/act_index.html
<http://www.thirdage.com>
<http://www.ucpa.org/html/innovative/atfsc/fedwork.html>
<http://www.usdoj.gov/crt/ada/adahom1.htm>

ANNEX I :
Members of the Advisory Council

1. Country correspondents

Finland:	Eija Mäkinen, Helsinki
France:	Cyril Kretzschmar, Economie et Humanisme, Lyon
Germany:	Lutz Kubitschke, empirica Gesellschaft für Kommunikations- und Technologieforschung mbH, Bonn
The Netherlands:	Prof. Herman Bouma, Scientific Director, Institute for Gerontechnology, Eindhoven
Spain:	Lluisa Marrugat, c/o Fundacio CIREM, Barcelona
The UK:	Nick Irvine, Institute for Public Policy Research (IPPR), London Cristina Murrone, Programme Director, (IPPR), London

All of the above correspondents wrote the reports for their own countries, except for the Netherlands where the country report was written by Josephine Dries (NPOE).

2. Project partner representatives

EIM (European Institute for the Media)

Penny Campbell: Project co-ordinator, researcher

Rosemarie Gilligan: Researcher

NPOE (Netherlands Platform for Older People and Europe)

Josephine Dries: Project co-ordinator, researcher

Ger Tielen: Project advisor

3. PROMISE project representatives

Kevin Cullen: Work Research Centre, Dublin
Co-ordinator of the PROMISE project

Christine Marking: Eurolink Age, Brussels
Member of the PROMISE project consortium

