

Design for Health:

A Bulgarian Solution
for Europe's Aging Problem

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Politecnico di Milano

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Preface

Project's Aims and Tasks

The studies of senior housing design become more and more important as a result of demographic and lifestyle changes in the world. Today we witness how the building of the retirement facilities turns into entire industry. This requires more and more attention not only on behalf of the policy makers but also the architects and designers. The current study is based on a real investor's project for building an Elder's House in the village of *Salasuka*, Central Bulgaria that will correspond to the latest theory and practice achievements in the field of elders' housing. The attempt is to harmonize the principles of architectural design and specific functionality while taking into account the characteristics of natural landscape and climate, historical and architectural heritage, existing infrastructure and social networks at the place.

Structure

Respectively, the work is divided into two parts each of them complimenting the other:

- Theoretical
- Practical

The **First Part** deals with the theoretical aspects of the intensifying problem of "Aging Europe". The issues of "graying" demography, the development of awareness to the human needs in specific age segment, the EU policy and world situation are studied and enlightened. The other important issue is related to the architectural design itself. For this the typology of retirement facilities and different approaches in architectural design has to be studied and presented. Respectively the forms of elder care provided vary greatly among countries and is changing rapidly. Even within the same country, regional differences exist with respect to the care for the elderly. The issues common to all EU health care systems and technologies applied are subject of analyses.

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The main themes, principles and concepts in elders housing achieved by prominent architects and researches have to be studied in search for a start-point in design solutions in the particular investor's assignment for *Salasuka Elder's House Project*. Human-centered universal design is essential in the development of all new senior housing concepts. While they provide the basis for increased accessibility, safety and health for a diverse population, the specifics related to the architectural design are also to be in the main focus of the study. On the basis of 10 case studies analyzed and compared the main architectural concepts and principles are examined.

Relocation of retired people in the last decade became more and more visible. This is their response to the need to keep previous standard of living coupling with lower income from the pensions. Lately the question where to live after retirement is more and more considered by many Europeans that are at the threshold of retirement. Tracing the trend in the EU geography aims to specify the potential of relatively new member like Bulgaria. Special attention is put on its natural advantages and historical and cultural heritage that might attract European elders to the country.

In the last 10 years Bulgaria became a preferred country to live after retirement mainly by British people and there are lots of places where one can find more or less compact "English settlements" – on the Black Sea coast, near it and in mountainous areas in Central Bulgarian Region. This makes it necessary to estimate the cultural results of such influx and its potential to strengthen the cultural dialog in culturally diverged societies in the West and the East of European continent. The aim is to outline what model of intercultural dialog can be built out of this global trend.

The **Second Part** of the thesis is to develop an architectural project of the Elder's House in *Salasuka* Village according to the specific investor's assignment. This part is a practical implementation of theoretical studies made in the **First Part**. The project aims to become exemplary for future developments in the country as buildings with that specific functionality are still rarity while having the great perspectives for the future. The architectural aim here is to harmonize as much as possible the investor's requirements with the best world practices and thus achieving the goal of fully meeting the new, higher standards and principles, described in the previous Chapters of the current work, while tailoring the building to the specific climatic and area conditions, architectural traditions and modern visions in architectural design.

All of the above shows the significance of the project, not only from an architectural point of view, but also as a center of important social and cultural activities, contributing for the economic development of the region and stimulating the activity of local people, helping them to change their mostly traditional thinking and timid business activity. Thus, the Home for Elderly People in *Salasuka*, will be an important cultural and social center trilling the local activity and getting the fresh air to the life of the region.

The main aim of in this project is to meet theory and practice in a harmony of principles of architectural design and functionality creating a whole, which provides an alternative answer to the problem of elders housing.

Part I

Introduction to the problem

Planning and design of retirement facilities gains more and more importance not only in Europe, but also worldwide. The reasons are complex and vary, yet the first come demography and change in way and quality of life and family in our post-modern world. Since the modernity destroyed traditional or patriarchal family models neither elder nor children want to live together or “under one roof”. During the 20th century this differentiation in way of living among generations lead to the development of new services in social and medical care and building the retirement facilities became an industry. Except for the state owned, entire network of privately owned and operated elder’s complexes and houses are in operation today.

These types of projects have not been regarded as a glamorous for most architects, but we see that we must put our attention to them, as they are becoming a huge part of the actual needs of the society. Due to the demographic shift, the social and lifestyle change is enormous. The home-like environment and suitable climate are important part for the promotion of an active and independent living for as long as possible. As the needs of the elder people are becoming more and more complex and urgent, they must be addressed adequately.

Demography

General overview

Aging of population is a stable trend since the last decades of 20th century. A number of European nations such as Denmark, Austria, Belgium and Luxembourg experienced one or more years of population decline during the 1970's and 1980's, but lately have managed to stay slightly in plus territory Statistics from the United Nations vividly confirm what the world's demographers have long known: Europe is a dying continent. Over the 90s one European country after another has fallen into the state of natural population decline, i.e. more deaths than births. In 1993/94 those countries experiencing the greatest imbalance of deaths over births were the Russian Federation (750,000), Ukraine (180,000), and Germany (nearly 115,000). In the case of Germany (and Italy), only recent net immigration has kept the total population from falling.¹

In 1992 Germany had a net immigration of more than 710,00 into the country of which more than 238,00 were from the war torn former Yugoslavia-Bosnia and Herzegovina (70,000) and other areas (168,000). The Russian Federation (62,000), Romania (57,000), Poland (29,000), and Turkey (39,000) were the other main European contributors to Germany immigration, while Africa (36,000), and surprisingly Asia (133,000), were also large sources of immigrants.² In Italy, “due to an influx of immigrants the population grew by 128, 00 in 1994 to slightly over 57 million....”³

As a consequence of its birth dearth the European continent will soon have older than younger people, a complete reversal of the traditional age pyramid. Indeed, a study undertaken in Madrid in

¹ “Western Europe, its births falling, wonders who'll do all the work,” The New York Times, 22 July 1990, pp. 1,12 at 12.

² Statistches Jahrbuch 1994, Wiesbaden, p. 92.

³ “Low birth rate is becoming a headache for Italy,” The New York Times, 28 August 1993. See also: (“Italy declining birth rate plummets further in 1994,” Reuter, Rome, 25 July 1995.

mid-80s disclosed that at the time “the city had more people over 65 than under 15,” a situation unknown anywhere aside from American retirement communities.

In 1965 more than one million babies were born in Italy; while in 1995 expectations were for little more than a half-million will be born. In August 1993, the Italian government announced that the nation's school system would drop 56,000 classes that fall, due to the decrease in the numbers of pupils.⁴ By the year 2000, it was predicted then that “Italy will have five million fewer children under the age of 15 than it did in 1990,” while at the same time there would be “five million more people aged 65 and up.”⁵

Already Italy's work force of 20 million has been overtaken by the number of pensions being paid out: 21 million pensions to 15 million retirees, some of whom legally draw more than one. The situation is destined to get far worse. The Agnelli Foundation, a research organization run by Fiat, has projected that in the first third of the next century there will be two people drawing pensions for every person paying contributions.⁶

In Germany, the plunge in births has been going on for at least a quarter of a century. Earlier, a population age-structure weighed to young adults and children kept the country's population from falling; in recent years, as the nation has aged considerably, death rates have risen above the birth rate. At this point immigration alone has spared Germany from undergoing a severe population decline. How much longer Germany will allow large numbers of immigrants to enter the country is an open question.

Meanwhile in Germany, as in Italy and other Western countries, the social security and pension systems face a difficult future with retirees projected to outnumber workers early in the next century.

While the German “baby bust” has affected all areas of the country, it has been most pronounced in the former communist states of East Germany. In Brandenburg, for instance, births have plummeted from nearly 38,000 in 1989 to barely 12,000 in 1994. In the four other eastern states, births have dropped by more than 50 percent over the same period.⁷ In an attempt to stem the birth decline, late last year Brandenburg announced that it would pay parents \$650 for every new baby they have. An even more generous program of “*kindergeld*” — which can reach a monthly cap of \$420 for a family of four — has been paid in western Germany since 1955 with little success. Other European countries, including Hungary, Poland, Belgium, Luxembourg and Portugal, also provide payments to families of newborns, again with few notable results.⁸

The worst population implosion of all is occurring in the Russian Federation and other former republics of the USSR. The Russian population decline is especially alarming since it is fed not only by a declining and well-below replacement level birth rate, but also by an unprecedented rise in the numbers of early deaths of working-age men. The dramatic increase in deaths of Russian men aged 30 to 50 has pulled down male life expectancy from a 1991 average of 63.5 years — which was already well behind most other nations — to an astonishing 57.7 years in 1994.⁹ Russian male life expectancy is by far the lowest of all industrialized countries.¹⁰ Indeed, the life expectancy for

⁴ Ibidem.

⁵ Ibidem.

⁶ Ibid.

⁷ “\$650 a baby: Germany to pay to stem decline in births,” The New York Times, 25 November 1994, p. A3.

⁸ “Russian population declining as births, life expectancy drop,” The Washington Times, 26 September p. A12.

⁹ Ibidem.

¹⁰ “Population changes in the former Soviet republics,” Population Bulletin, Population Reference Bureau, Vol. 49, No. 4, p. 17.

boys born in Russia that year was lower than that of India, Egypt or Bolivia.¹¹ If current conditions persist, nearly half of today's Russian youth will not even reach the retirement age of 55 for women and 60 for men. The Russian death rate in 1994 — 15.6 per 1,000 population — increased by nearly 10 percent over the previous year and has soared almost 30 percent since 1992.¹² Current Russian birth rates are the lowest in the nation's history, substantially lower than those achieved during the upheavals of World War I and the Russian Revolution, and equaled only by the worst year of World War II when German armies overran the country. The sharp drop in Russian births is a direct result of the collapse of the economy and a general lack of confidence in the future due to the sudden loss of a social system that formerly provided housing for nearly every Russian. If these trends continue, some Russian demographers have projected that the present population (148 million) will drop by 20 percent within the next two decades and could then be cut in half every 25 years thereafter. According to a UNICEF report, such abnormally high male death rates are producing demographic profiles that “parallel or even surpass those normally observed in wartime conditions.”¹³

A somewhat similar situation exists in Hungary, which has been losing population for the past decade. There, the murder rate has soared in recent years but even more unsettling is the finding that “for every murder in Hungary there were nine suicides.”¹⁴

Demographic statistics throughout Europe point to an uncertain, if not outright bleak, future. In 1987, Antonella Pinnelli, a Rome-based sociologist-demographer, called the continent's flight from fertility “very worrisome, because when a society loses the will to reproduce, it loses its vitality.”¹⁵

The ageing population in Europe: trends and outlook

The United Nations has been drawing attention to the ageing of the world population since 1982, when it organised the first conference on this subject and adopted an international plan of action on ageing on this occasion.

The European Councils at Stockholm (2001) then Barcelona (2002) emphasised the scale of the demographic challenge in the EU. The reforms presented by the EU are part of the renewed Lisbon strategy and respond to a common perspective of restored confidence. The reform process and implementation of these initiatives will be the subject of the next biennial European Demographic Forum, which was held for the first time in October 2006 and will form the subject of a chapter in the Annual Progress Report introduced under the Lisbon strategy.

Key figures (EU 27)

Rate of the population of working age in 2050 (aged 20-64): 52 %

Rate of the population aged from 15 to 24 in 2050: 19 %

Rate of the population aged 65 and over in 2050: 29 %

Dependency ratio in 2050: 50 %

Fertility rate in 2060: 1.68 children per woman (replacement threshold 2.1)

Life expectancy for women in 2060: 89 years

¹¹ “Plunging life expectancy puzzles Russia,” *The New York Times*, 2 August, pp. 1, 6.

¹² *Ibid*, p. 6.

¹³ “Deaths skyrocket in former Soviet bloc,” *The Sun* (Baltimore), 10 February, p. A10.

¹⁴ *Ibidem*.

¹⁵ “Falling population alarms Europe,” *The Washington Times*, 2 December 1987, pp. 1, 8, at 8.

Life expectancy for men in 2060 : 84.5 years

Net migration in 2007: +1.9 million¹⁶

The **Ageing of Europe**, also known as the **greying of Europe**, is a demographic phenomenon in Europe characterized by a decrease in fertility, a decrease in mortality rate, and a higher life expectancy among Europeans.¹⁷

Italy will need to raise its retirement age to 77 or admit 2.2 million immigrants annually to maintain its worker to retiree ratio.¹⁸ About 25% of Italian women do not have children while another 25% only have one child.

The region of Liguria in northwestern Italy now has the highest ratio of elderly to youth in the world. Ten percent of Liguria's schools closed in the first decade of the 21st century. The city of Genoa, one of Italy's largest and the capital of Liguria, is declining faster than most European cities with a death rate of 13.7 deaths per 1,000 people, almost twice the birth rate, 7.7 births per 1,000 people, as of 2005.

Figures for the population of Europe vary according to which definition of European boundaries is used. The population within the standard physical geographical boundaries was 731 million in 2005 according to the United Nations. In 2010 the population is 857 million, using a definition which includes the whole of the transcontinental countries of Russia and Turkey. Population growth is comparatively slow, and median age comparatively high in relation to the world's other continents.¹⁹

The European Union (EU) currently has to cope with demographic decline, low natural growth and the ageing of part of its population.

Demographic ageing, i.e. the proportion of older people within the total population, is the result of significant economic, social and medical progress in terms of the services offered to Europeans. This demographic ageing is the outcome of a number of simultaneous **demographic trends: the average number of children per woman**, which stands at 1.5 children in the EU whereas the **population replacement level** is 2.1. The rate projected by the EU for 2030 is 1.6; the **decline in fertility** ("baby crash") which followed the baby boom is the cause of the large proportion of 45-65 year-olds in Europe's population, and poses a number of problems in terms of pension funding; **life expectancy** (which rose by eight years between 1960 and 2006) could continue to increase by a further five years between 2006 and 2050 and would thus result in a larger proportion of people surviving to the ages of 80 and 90 – an age when their health situation can often be delicate; **immigration** (1.8 million immigrants into the EU in 2004, 40 million in 2050 according to Eurostat's projections) could offset the effects of low fertility and extended life expectancy.

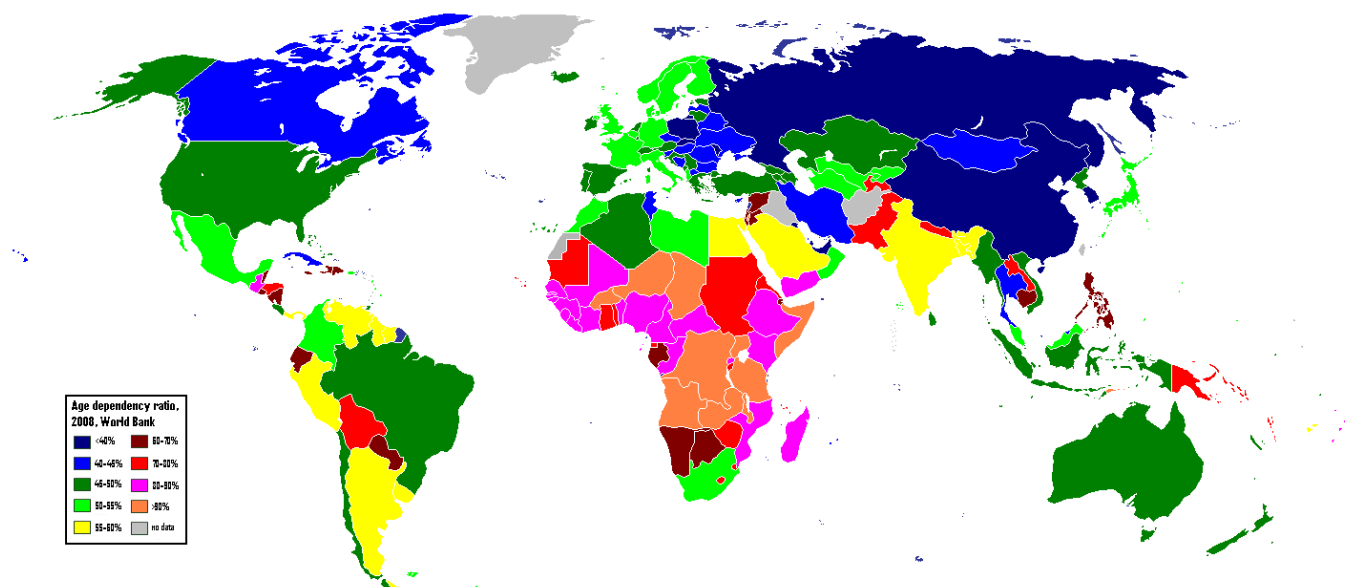
16 Population projections, 2008

17 Giuseppe Carone and Declan Costello (2006). "Can Europe Afford to Grow Old?". International Monetary Fund Finance and Development magazine.

18 "Demographic Transition Model". Barcelona Field Studies Centre. 27 September 2009.

19 For more details see:

<http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&plugin=1&language=en&pcode=tps00010>



World map of age dependency ratio

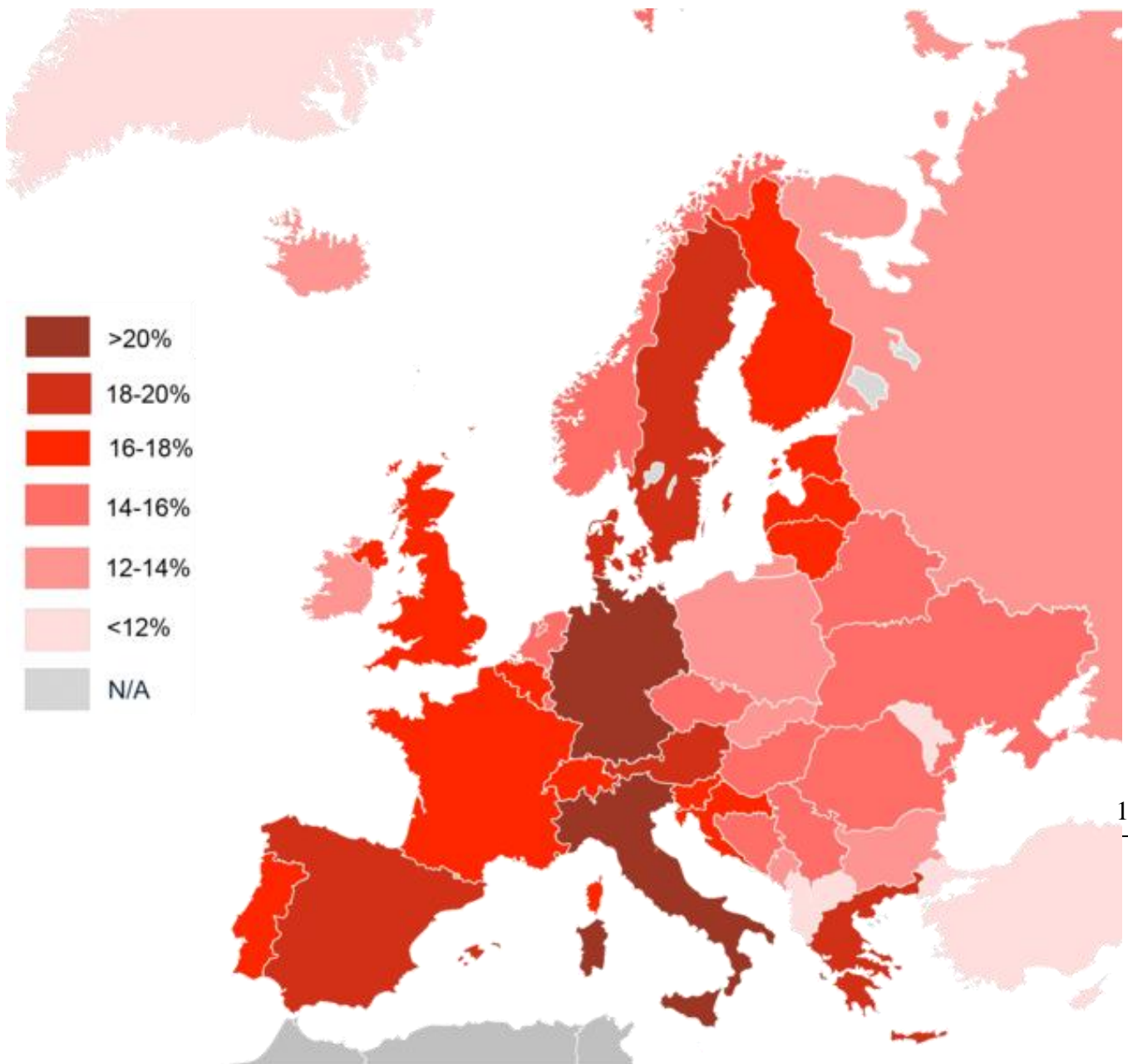
In 2008, the demographic development of the European Union (EU) reached a turning point, considering the rapid ageing of the European population. From this date on, and for the next twenty-five years, the segment of the population aged 60 years and above should start to grow by an average of 2 million each year. At the same time the segment of the population of working age should shrink by 1 to 1.5 million per year from 2014.²⁰

These trends will slightly lower the total EU population, which will also become much older. The working-age population (15 to 64) in EU-25 will fall by 48 million between 2006 and 2050 and the dependency ratio is set to double, reaching 51% by 2050. This **demographic change** will also be accompanied by profound **social changes** (social protection, housing, employment) in all the countries confronted with the challenge of an ageing population.

This demographic trend will certainly have serious consequences on the level of economic growth and on the viability of public finances of EU Member States. It also constitutes a factor that will transform the structure of European families. The use of statistical data in demographics should also allow social and family policies to be targeted.

Member States should continue to promote the employment of seniors. In 2007, 50% of men and 40% of women were still working at 60 years old. These rates demonstrate an increase in employment since 2000, in line with the objectives of the Lisbon Strategy for active ageing. Moreover, the number of active women is increasing in all Member States, without having an impact on birth rates. Appropriate national and European policies should allow their rate of employment to be increased, through measures to favor families, the fight against poverty and the reconciliation of work and family life.

20. Commission staff working document – Demography Report 2008: Meeting Social Needs in an Ageing Society [SEC(2008) 2911 - Not published in the Official Journal.



Europe population over 65

The **ageing population** will also have an impact on **social protection** and **public finances**. On the basis of current policies, ageing will lead to considerable upward pressures on public spending. Budgetary deficits of this type could compromise the future equilibrium of pension and social protection systems in general and perhaps even the potential for economic growth or the functioning of the single currency. The EU governments have, however, already started to take action, especially in the fields of public pensions or the modernisation of social protection systems. Better adapted healthcare services and a preventive approach to chronic diseases could, finally, reduce public spending on health and dependency care by half.²¹

²¹ For more details on EU policy in long-term care: <http://ec.europa.eu/social/main.jsp?catId=792&langId=en>

Ageing Policies

The citizens of the European Union are increasingly older citizens. By the year 2020 people aged 60 and over will comprise one in five of the EU's population and those aged 65 and over would have made up just one in fourteen of the Union's population. Alongside of the ageing of the population we are witnessing profound transformation in the experience and meaning of old age in late twentieth century society. Retirement is no longer the straightforward entry-point to old age that it once was and, therefore, it is increasingly anachronistic as a definition of older people. With increased longevity, older people are living longer and healthier old ages and, as a result, the threshold of frailty is being pushed back. These changes in age structure, health and patterns of employment are transforming the very nature of old age.

Today, there are more than 70 million people aged 60 and over in the EU, representing just under one in five of the population. Nearly one-third of the Union's population and one-fifth of the labor force are over the age of 50. Within the older category, the part occupied by the very old, the over-eighties, who are more likely to be ill and become dependant, is growing even more rapidly: by 2020, about 20 million people will be aged 80 and over in the present territory of the European Union - representing an increase of some 300 percent in this age category since 1960.

The two main factors explaining this demographic revolution are declining fertility and mortality rates: fewer children and older people. While on average around 2.1 children per woman of child bearing age are required to replace the population, actually, the EU average is 1.59. This usually takes the scope of a "demographic revolution". This success, particularly the fall in mortality rates among older people themselves, has increased the demand for health and social care. Population ageing is posing a challenge to policy makers in Member States because retirement or old age pensions are already the largest item in their social security budgets. This is particularly the case for those countries that have previously instituted major reforms to public pensions are now facing the twin financial implications of population ageing and pension system maturation. Moreover at a time of economic recession concerns about the financial stability of pensions and wider social security systems inevitably become more urgent. The main issue is the extent to which the rapid changes in the age structure of populations can be managed in ways that maintain the relatively high levels of intergenerational solidarity in EU countries and which also ensure the continuance of social integration among older people and their families.²²

Until recently population ageing has been mostly associated with the more developed regions of the world. For example, currently nine of the ten countries with more than ten million inhabitants and the largest proportion of older people are in Europe (see Table 1). Little change in the ranking is expected by 2025 when people age 60 and over will make up about one-third of the population in countries like Japan, Germany and Italy, closely followed by other European countries.

The role of the European Union in the field of ageing, legislative competence rests almost exclusively with Member States. Indeed, in some cases, important competences are to be found at the regional and local as well as the national level. However, the EU can play a role in support of those policies and actions as established and implemented at the appropriate level, through stimulation of new thinking and exchange of experience. This role, while limited in scope and cost, can be of significant value both for the EU as a whole and for the authorities concerned with the issue of ageing.

²² http://ec.europa.eu/employment_social/soc-prot/ageing/intro_en.htm

EU Documents on ageing policies ²³

Age and attitudes. Main results from a Eurobarometer Survey, Commission of the European Communities 1993.

European network of innovative projects concerning older people, Commission of the European Communities 1993.

Older people in Europe: social and economic policies. The 1993 Report of the European Community Observatory, Commission of the European Communities 1993.

Older people in Europe - social and economic policies. Recent developments, Commission of the European Communities 1994.

Social Europe. The outlook on supplementary pensions in the context of demographic, economic and social change (a report by the EU network of experts on supplementary pension provision - 1996), Supplement 7/96, European Commission 1996.

Proposal for a Council Decision on Community Support for Actions in favour of Older People / Community actions for older people 1991-1993 including the European Year of Older People and Solidarity between Generations / EVALUATION REPORT (presented by the Commission), COM (95) 53 final, Commission of the European Communities 1995.

Retirement

In most countries, the idea of retirement is of recent origin, being introduced during the 19th and 20th centuries. Previously, low life expectancy and the absence of pension arrangements meant that most workers continued to work until death. Germany was the first country to introduce retirement in the 1880s.

Nowadays most developed countries have systems to provide pensions on retirement in old age, which may be sponsored by employers and/or the state. In many poorer countries, support for the old is still mainly provided through the family. Today, retirement with a pension is considered a right of the worker in many societies, and hard ideological, social, cultural and political battles have been fought over whether this is a right. In many western countries this right is mentioned in national constitutions.

A person may retire at whatever age they please. However, a country's tax laws and/or state old-age pension rules usually mean that in a given country a certain age is thought of as the "standard" retirement age.

The "standard" retirement age varies from country to country but it is generally between 50 and 70 (according to latest statistics, 2011). In some countries this age is different for males and females, although this has recently been challenged in some countries (e.g., Austria), and in some countries the ages are being brought into line. ²⁴The table below shows the variation in eligibility ages for public old-age benefits in the United States and many European countries, according to the OECD.

The table below shows the variation in eligibility ages for public old-age benefits in the United States and many European countries.

²³ For more details see: Vanhuyse, Pieter and Achim Goerres (eds.) Abingdon: Routledge/ECPR Studies in European Political Science. (2011). **Ageing Populations in Post-Industrial Democracies: Comparative Studies of Policies and Politics.**

²⁴ OECD (2005). *Ageing and Employment Policies: Austria.*

Country	Early retirement age	Normal retirement age	Employed, 55–59	Employed, 60–64	Employed, 65–69	Employed, 70+
Austria	60 (57)	65 (60)	39%	7%	1%	0%
Belgium	60	65	45%	12%	1%	0%
Denmark	none	65	77%	35%	9%	1%
France	62*	65*	51%	12%	1%	0%
Germany	65	67	64%	23%	3%	0%
Greece	57	65	51%	31%	8%	1%
Italy	57	65 (60)	34%	12%	1%	0%
Netherlands	60	65	53%	22%	3%	0%
Norway	62	67	?	?	?	?
Spain	60	65	46%	22%	0%	0%
Sweden	61	65	78%	58%	5%	1%
Switzerland	63 (61), [58]	65 (64)	77%	46%	7%	2%
United Kingdom	none	65	69%	40%	10%	2%
United States	62	67	66%	43%	20%	5%

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Rising retirement age is a trend in almost all countries, including EU.

French unions have staged nationwide strikes in protest at government plans to raise the retirement age to 62 and reform state pensions.

Meanwhile, the Coalition government has proposed rising the retirement age to 66 by 2016 and possibly to 70 by 2046.

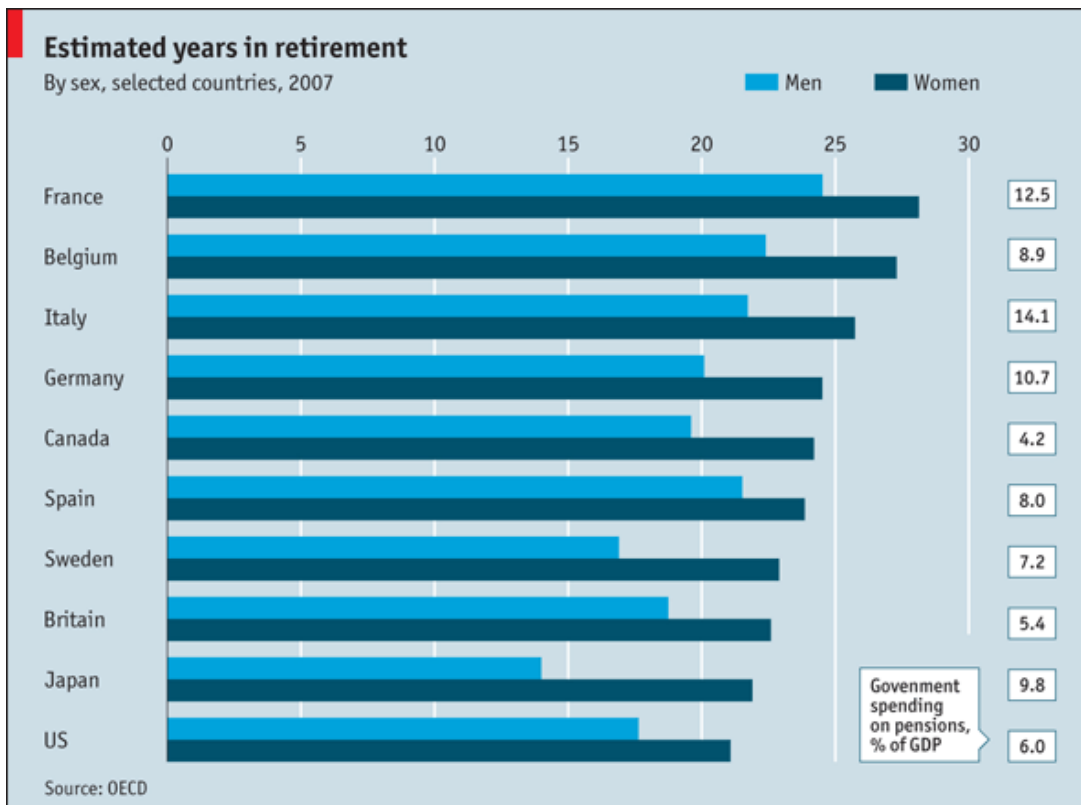
EU figures show the average retirement age is 61 in Greece, 62 in Germany and 59.4 in France. Here are details of some of the changes planned in retirement following austerity measures around Europe: ²⁶

The French spend longer in retirement than almost anybody else. French women enjoy 28 years as pensioners and French men 24 years, six years more than the OECD average. Americans, by contrast, have among the shortest spells in retirement: just 18 years for men, and 21 years for women. France's government does not, though, spend as much money on pensions as Italy's, which devotes 14.1% of GDP to retirement spending, next to 12.5% in France and just 6% in America. ²⁷

²⁵ Data compiled from: [OECD \(2005\). *Ageing and Employment Policies: Austria*](#).

²⁶ Read more: <http://www.thisismoney.co.uk/money/pensions/article-1696682/Rising-retirement-ages-in-Europe-compared.html#ixzz1YeJlnCqg>

²⁷ <http://www.economist.com/node/17008998>



FRANCE:

- Raising France's statutory retirement age, which at 60 is one of the EU's lowest, is the linchpin of a reform plan.
- The retirement age will rise gradually for people born after 1950 by four months a year to 62 in 2018. This measure will kick in from July 2011. It overturns a Socialist policy introduced by the late President Francois Mitterrand in 1983.
- President Nicolas Sarkozy hopes reform will convince investors he is serious about cleaning up state finances, which are set to register record deficit and debt levels in 2010.

GREECE:

- Pension reform will be a major test of the government's resolve to put derailed public finances back on track, with a draft law expected this week amid strong domestic opposition.
- The EU and the IMF have imposed strict guidelines including raising women's retirement age from 60 to 65 matching that of men, and imposing penalties on early retirement.
- With perks including early retirement for hundreds of supposedly 'arduous' professions such as hairdressers, butchers and cheese factory workers, the pension system has cost the debt-choked nation about 12% of gross domestic product.

BRITAIN:

The new Conservative-Liberal Democrat government confirmed in its emergency budget on June 22 it would review accelerating the increase in the state pension age to 66.

- 'We are also planning to review the date at which the state pension age starts to rise to 66,' Works and Pensions Secretary Duncan Smith said, adding: 'We also have to think about the pace of change as we move beyond 66.'

ITALY:

Italy's cabinet agreed on June 10 to rise the retirement age for women working in the public sector to 65 from 2012 to bring it in line with that for men, as requested by the EU, the welfare minister said.

- Men and women in the public and private sectors can still retire before 65 if they have worked for long enough under a system which combines workers' age with the number of years of pension contributions paid.
- The measures had no implications for private sector workers, where the average retirement age is around 61.

SPAIN:

- The government faces growing anger over steps taken to rein in the public deficit.
- Prime Minister Jose Luis Rodriguez Zapatero tested the waters on pension reform in February when he announced plans to raise the retirement age to 67 from 65, causing widespread outrage among Spaniards.
- The Spanish government hopes to hold cross-party talks by autumn on pension reform.

IRELAND:

Last December the regular budget delivered savings of more than 4 billion euros. It also announced from 2010 an increase in the minimum public service pension age to 66 from 65, with a maximum retirement age of 70.

GERMANY:

Germany's upper house of parliament in 2007 gave final approval to a measure for a gradually phased increase in the retirement age to 67 from 65. Under the reform, the increase is to take effect in steps between 2012 and 2029

Elders Care

The “demographic revolution” and change in way of living while aging requires new approach to the needs of this all growing part of society taking into consideration all the new demands and trends. **Elderly care** or simply **eldercare** is the fulfillment of the special needs and requirements that are unique to senior citizens. This broad term encompasses such services as **assisted living, adult day care, long term care, nursing homes, hospice care, and In-Home care.**

A **retirement community**, or **active adult community**, is a very broad, generic term that covers many varieties of housing for retirees and seniors - especially designed or geared for people who no longer work, or restricted to those over a certain age. It differs from a retirement home which is a single building or small complex where no "common areas" for socializing exist. Many retirement communities are planned for that purpose, and have special facilities catering to the needs and wants of retirees, including extensive amenities like clubhouses, swimming pools, arts and crafts, boating, trails, golf courses, active adult retail and on-site medical facilities.

Naturally Occurring Retirement Communities (NORCs) can involve low-income residents receiving a richer mix of public services through a NORC model. They might serve people of all income levels who got together to furnish cost-effective transportation services. And there are NORCs for relatively affluent households that may charge \$1,000 or even more in annual dues, and support paid and volunteer staffers who provide a rich variety of support services and cultural enrichment activities. NORCs can be very effective mechanisms to identify populations of people who need government-provided services and then provide those services in cost-effective ways²⁸. An example would be Beacon Hill Village in Boston²⁹ provides support and resources for those

²⁸ ["Retirement Communities Terms"](#). *Retirement Community*. April 2009.

²⁹ Gross, Jane (February 2006). "Aging at Home: For a Lucky Few...". *New York Times*. Retrieved 2008-11-14.

who do not want to leave their current neighborhoods. Another term may be used for a predominantly senior citizen community, in which residence is unrestricted by age and job affiliation. There are

Cultural and geographic differences

The form of elder care provided varies greatly among countries and is changing rapidly. Even within the same country, regional differences exist with respect to the care for the elderly. Traditionally elder care has been the responsibility of family members and was provided within the extended family home. Increasingly in modern societies, elder care is now being provided by state or charitable institutions. The reasons for this change include decreasing family size, the greater life expectancy of elderly people, the geographical dispersion of families, and the tendency for women to be educated and work outside the home. Although these changes have affected European and North American countries first, it is now increasingly affecting Asian countries also. According to *Family Caregiver Alliance*, the majority of family caregivers are women: “Many studies have looked at the role of women and family caregiving. Although not all have addressed gender issues and caregiving specifically, the results are still generalizable to women because they are the majority of informal care providers in this country. The percentage of family or informal caregivers who are women ranges from 59% to 75%. The average caregiver is age 46, female, married and working outside the home earning an annual income of \$35,000. Although men also provide assistance, female caregivers may spend as much as 50% more time providing care than male caregivers.”

In most western countries, elder care facilities are residential family care homes, freestanding assisted living facilities, nursing homes, and Continuing care retirement communities (CCRCs). A Family Care Home is a residential home with support and supervisory personnel by an agency, organization, or individual that provides room and board, personal care and habilitation services in a family environment for at least two and no more than six persons.

In the United States, most of the large multi-facility providers are publicly owned and managed as for-profit businesses. There are exceptions; the largest operator in the US is the Evangelical Lutheran Good Samaritan Society, a not-for-profit organization that manages 6,531 beds in 22 states, according to a 1995 study by the American Health Care Association.³⁰ Given the choice, most elders would prefer to continue to live in their own homes (aging in place). Unfortunately the majority of elderly people gradually loses functioning ability and requires either additional assistance in the home or a move to an eldercare facility. The adult children of these elders often face a difficult challenge in helping their parents make the right choices.

The EU's overall health situation and health care systems are among the best in the world, thanks to the widespread extension of cover against sickness and invalidity, the rise in the standard of living, improved living conditions and better health education.

Total health care spending rose from around 5% of GDP in 1970 to over 8% in 1998. Public health care spending followed the same trend of growing faster than GDP in most countries.

³⁰ Aging Statistics, U.S Department of Health and Human Services (June 2010)
http://www.aoa.gov/aoaroot/aging_statistics/index.aspx

Issues common to all EU health care systems

The impact of demographic ageing on health care systems and expenditure

The ageing of the population in Europe involves two aspects: since 1970, life expectancy at birth has risen by 5.5 years for women and almost 5 years for men. This trend also means higher life expectancy in "good health" and in the absence of disability; there are more elderly people. The proportion of the total European population older than 65 is set to increase from 16.1% in 2000 to 27.5% by 2050, while the proportion of the population aged over 80 years (3.6% in 2000) is expected to reach 10% by 2050.

If Eurostat's basic scenarios are confirmed, public expenditure on health care could increase by between 0.7 and 2.3 GDP points in the period 2000-2050.

The increase in the numbers of elderly people will thus increase the pressure on the public sector for long-term care.

In light of these needs, health care structures, methods of financing and the organisation of services will have to evolve. It will be particularly important to deal with the increased need for skilled manpower, as smaller and more unstable family structures make it increasingly difficult to rely on the support of family networks.

The growth of new technologies and treatments

Developments in medical technology (gene therapies, growing replacement organs, new medicinal substances, etc.) provide benefits for patients, for example by reducing the risks of serious illness by means of preventive treatment. However, these innovations come at a cost, and financing is an issue that must be considered. In the context of prudent budget management, clear, transparent and effective evaluation mechanisms must be developed, as this is the only way to guarantee greater accessibility to these new products and treatments.

The increase in patients' demands

It has been observed for half a century that the demand for health care tends to increase more than proportionally to the per capita income. Demand is determined by standard of living and level of education. This has three main consequences:

- Patients are better educated and are able to adopt healthier lifestyles and a prevention-based attitude which in the long run makes it possible to avoid the need for costly care. This is why health care systems are focusing increasingly on education and prevention;
- Patients expect ever better quality and efficiency from health care systems. The spread of information technologies gives patients access to more information on services available at European level and allows them to make an increasingly well-informed choice;
- Health care consumers feel that they need to be considered as partners and players in health care systems, not only by health professionals but also by the public authorities. They also expect greater transparency on the performance and quality of care services.

THREE LONG-TERM OBJECTIVES: ACCESSIBILITY, QUALITY, VIABILITY

While the organisation of health care systems, their funding (ratio of public/private funding) and planning as a function of the needs of the population are a matter for the Member States, this responsibility is exercised increasingly within a general framework on which many Community policies have a bearing (research, public health policy, free movement of persons and services, viability of public funds). This is an argument for strengthening European cooperation. The Communication identifies three long-term objectives for national systems, which should be pursued in parallel.

Accessibility

Access to health care is a right enshrined in the **Charter of Fundamental Rights of the European Union**. However, it is often affected by an individual's social status. It is therefore particularly important to ensure that access to health care for disadvantaged groups and for the poorest members of society is guaranteed.

The joint report to evaluate the national action plans for social inclusion proposes three categories of measures:

- Measures to develop disease prevention and promote health education (mother and child care, medical care at school and medical care at work);
- Providing less expensive and even free care for those in low-income brackets;
- Measures aimed at disadvantaged groups, e.g. the mentally ill, migrants, the homeless, alcoholics and drug addicts.

Quality

In order to provide quality health care, national governments are required to achieve an optimum balance between the health benefits and the cost of medication and treatment. Ascertaining quality in this way is made complex by:

- The diversity of the structures and levels of health care, which often influence demand for health care and consequently the level of expenditure;
- The different approaches to medical treatment.
- Comparative analysis of health care systems and medical treatment should make it possible to identify "best practice" and thus to help improve the quality of health care systems.

Financial viability

A certain level of financing is required to ensure the availability of high-quality health care that is accessible to the population. There is upward pressure on these health care costs, irrespective of the way in which Member States' health care systems are organised. Member States have been undertaking reforms since the early 1990s, based mainly on two methods:

- Regulation of demand, by increasing contributions or by ensuring that the final consumer bears an increasingly large share of the costs;
- Regulation of supply, by determining budgets or resource envelopes for health care providers, creating a contractual relationship between "buyers" and "providers" of health care.

It is often difficult, however, to distinguish the short-term effects from the more structural effects of these reforms, which allow spending to develop at a sustainable pace. This Communication recommends more exchanges of experience, which would help to keep track of the policies, introduced and would be a useful way of comparing health care systems and encouraging progress.

In order to achieve these objectives it is essential that all parties concerned (local authorities, health care professionals, social protection bodies, supplementary insurance companies, consumers) work together to build strong partnerships.

Background

This Communication is a response to the conclusions of the **Lisbon European Council** of March 2000, which stressed that social protection systems needed to be reformed in order to be able to provide high-quality health care services. It also takes up the request made by the Gothenburg summit (June 2001) to prepare a progress report for the Spring 2002 European Council suggesting guidelines in the field of health and care for the elderly.³¹

Documents:

Communication from the Commission of 20 April 2004 - Modernizing social protection for the development of high-quality, accessible and sustainable health care and long-term care: support for the national strategies using the "open method of coordination". Final Report.

This Communication proposes that the "open method of coordination" be extended to the health and long-term care sector. This will allow a framework to be established to promote exchanges of experience and best practices and support the Member States in the reform of health care and long-term care

Joint report from the Commission and the Council on health care and care for the elderly:

Supporting national strategies for ensuring a high level of social protection

The Barcelona European Council (2002) invited the Commission and the Council to examine more thoroughly the questions of access, quality and financial sustainability. A questionnaire was sent to the Member States in 2002 in order to collect information on their approaches to these three objectives. The joint report is based on the responses received.

This joint report was adopted by the "Employment, Social Affairs, Health and Consumer Affairs" Council on 6 March and by the "Economic and Financial Affairs" Council on 7 March as a contribution to the March 2003 European Council. Thus,

Restructuring elder care systems in Europe

This became the issue in the focus of policy-makers of EU.

Since the 1980s elder care systems and related policies have been subject to far-reaching restructuring processes in western European countries. The shape of processes can be explained by the interplay of national conditions related to the policy field of elder care and different modes of cross-border influences.

Since the 1980s elder care systems and related policies have been subject to far-reaching changing processes in most European countries. In particular, in continental European countries, new policy schemes have been implemented based on a newly defined statefamily-market nexus. Furthermore, since the end of the 1990s, in some continental European countries, migrants have increasingly been hired for care provision within the family framework as a bottom-up strategy of the users to fill care gaps. Both dynamics are intertwined to two different patterns of national and transnational policy

³¹ http://europa.eu/legislation_summaries/employment_and_social_policy/disability_and_old_age/c11310_en.htm

development. With regard to the implementation of long-term care policy schemes horizontal transfer processes between European countries can be found. In contrast, since the EU enlargement the employment of migrant caregivers within the family framework became gradually connected to regulations of the single market project, above all to the principle of free movement of services. The two case studies – that of Germany and Austria, shows the significant impact of the German model but revealed in addition the decisive role of the national conditions related to ideas as well as to actors and their interests. The comparison of elder care policy transfer among different European countries showed the impact of the German and Austrian care policy approach in continental European countries, and recently even in southern and central eastern European countries, which have been promoted by the introduction of the Open Method of Co-ordination.³²

The rising number of older people – either healthy or suffering from different age-related illnesses and requiring long-term care - will increase the pressure on the public sector (forecast for the increase of public expenditure on *health care* for the period 2000-2050 is 0.7-2.3 GDP points) consequently the care for older persons is not only a matter for the “conventional” health system, but also for the social sector defining the new concept of an integrated health and social care for older persons in need of care by comparing and evaluating different modes of care delivery by identifying structural, organisational, economic and social-cultural factors and actors that constitute an integrated and sustainable care system with enhanced outcomes for all actors involved.

The efforts are made to create networking systems that can contribute to the improving of general practice care for older people in Europe. More and more the concept of an integrated long-term care service shapes and unifies the new concepts. The aim is to improve social care for older people comparing and evaluating different modes of care delivery by identifying structural, organisational, economic and social-cultural factors and actors that constitute an integrated and sustainable care system with enhanced outcomes for all actors involved.³³

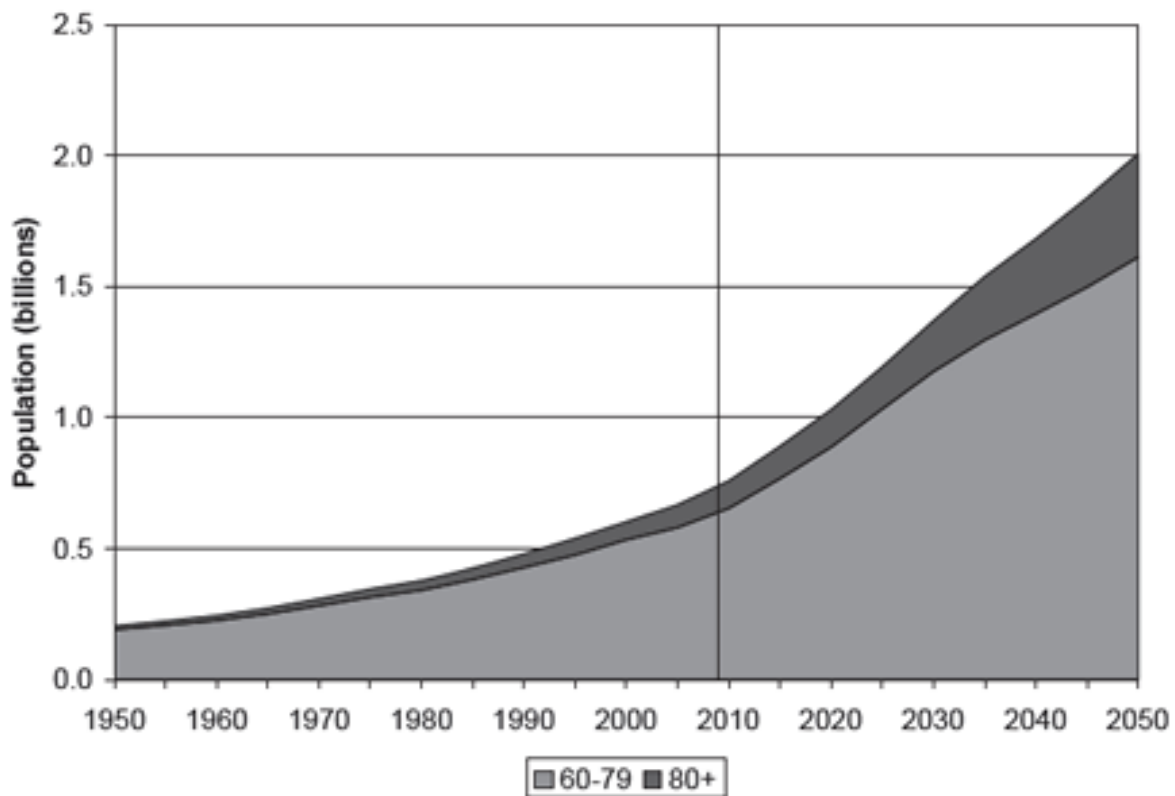
Elder boom and consequences

As the baby boom becomes an elder boom in coming decades, profound change will occur across North America and Europe as **the elderly become a dominant part of the population**. In the United States, 80 million babyboomers began to turn 50 in the last year and many are already looking to early retirement. Almost half of Europe's population could be over 60 by the year 2050 as population growth slows.³⁴ Those who are approaching retirement age today are at the vanguard of this much heralded demographic change, and with it, radical change in society's structure and business opportunity. Among those sectors expected to accelerate in demand is the assisted living marketplace.

³² Hildegard Theobald. Restructuring elder care systems in Europe: Policy-field, policy transfer and negative integration. Paper to be presented at the ISA RC 19 conference “Social Policies: Local Experiments, Traveling Ideas” 20-22 August 2009, Montreal, Canada. http://www.cccg.umontreal.ca/RC19/PDF/Theobald-H_Rc192009.pdf

³³ Assisted Living: New Opportunities for Hospitality as Demographics Change. *Andrea S. Wade, Los Angeles and Deborah S. Anthony, London*. See also: ftp://ftp.cordis.europa.eu/pub/life/docs/groo_session6.pdf; http://www.hotel-online.com/Trends/Andersen/AssistedLiving_1998.html

³⁴ Aging a bigger worry than population size. UK...News, Electronic Telegraph, June 19, 1997



Global Population³⁵

Assisted living represents a middle ground for the elderly. Housing accompanied by some assistance allows seniors to remain independent as long as possible. Services are tailored to the individual as they need them. Meanwhile, Wall Street has eagerly embraced offerings made by leaders in the industry, recognizing the significant growth prospects for assisted living. This \$16.5 billion market is projected to exceed \$20 billion in revenues by the year 2000 in the United States alone.³⁶

Assisted living represents a prime opportunity for hospitality companies willing to use the core competencies of hospitality to develop and operate communities for seniors. While most of the major hospitality entities have merged, consolidated or entered new market segments in last few years, only one hospitality company is currently a major player in the assisted living industry, Marriott International, which expanded into assisted living in 1989, now occupies the number two position on the chart for the top 25 U.S. Senior housing Owners and is ranked third in the top 25 U.S. Senior Housing Managers. In June of 1996, Marriott completed its merger with Forum Group, in the process acquiring an additional 42 assisted living facilities. As of October 1997, Marriott operated 82 assisted living communities, and the company plans to triple that number in the next five years.³⁷

Does Marriott's path in assisted living make sense for other hospitality companies? Clearly there are "cross-over" resources and skills between the hospitality and assisted living industries. Food and beverage and other processes in hospitality can be translated into assisted living operations. Indeed, hospitality companies with brands that represent service and quality have two of the most important ingredients when consumers make buying decisions in this industry. There are also challenges

³⁵ The source is: <http://transgenerational.org/aging/demographics.htm>

³⁶ Merrill Lynch, *The Assisted Living Industry: An Introduction to the Sector*, April 1997, p.5

³⁷ More on Marriott/Sodexo Merger, AMREX, October 8, 1997

for a hospitality company expanding in this industry, however, given its mission of providing care services to the elderly. Nevertheless, the prospects may be attractive to hospitality companies with significant resources, given that assisted living is likely to be the fastest-growing segment in the long-term care industry.

Trends Driving Assisted Living in North America

Three primary demographic trends will shape growth of the assisted living industry in the next few decades. Advances in nutrition and medical science have resulted in an increased life expectancy, and consequently growing numbers of elderly people. Many seniors are living longer, more active lives.

An increasing number of women enter the workforce; their ability to serve as the primary caregiver to aging parents has been greatly reduced, thus changing the role of the family in providing elderly care. A greater number of elderly are now living in isolation in many countries. In the United States, for example, the average family moves once every five years. Many families are widely scattered, leaving elderly parents alone. Family structures have radically changed in recent decades. The end result is an elderly population that has been left without the traditional sources of assistance needed to perform their daily activities. Families must increasingly rely on alternative solutions to fulfill their previous roles as caregivers.

Proactive companies in the assisted living industry have stepped in to provide these services to a market that is forecast to grow at a record pace. The number of people aged 65 and over in the United States is currently 34 million, accounting for 13 percent of the total population. That number is projected to grow to 69 million, or 20 percent of the total population, by the year 2030.³⁸ The number of elderly will only increase with the aging of the baby boom generation, those individuals born between 1946 and 1964. As this generation ages and retires, an increasing number of people over the age of 75 will require some level of care or assistance during the final years of their lives. The number of people aged 85 and over is currently 3.7 million and is projected to increase to 8.5 million by the year 2030. Demand will be driven by increases in how long people live. The average life expectancy for women aged 65 is projected to increase from 84.2 years in 1995 to 87.4 years in the year 2050.³⁹

The demographic shift in the European Union (EU) may be even more extreme than in North America, where the demographic structure of society is more greatly influenced by immigration and slightly higher birth rates. The population aged 60 or over in the European Union had climbed by 50 percent in recent years, reaching 68.6 million by 1992. Estimates place the number of older people in the European Union at 80 to 100 million by the year 2020, of which 27 to 29 million are estimated to be over 80 years old. The average life expectancy in Europe is estimated at 78 years for men and 82.5 years for women. This is reported slightly lower in the United Kingdom at 77.6 years for men and 81.7 years for women.⁴⁰

Also of urgent concern is the financial strength of the aging in the European Union, with poverty remaining a source of worry for many older people in EU countries. A 1993 Eurostate survey revealed that 48 percent of older people in the then 12 EU countries had financial difficulties.⁴¹ Health and social services for older people vary widely across Europe. Generally, however, the trend is toward de-emphasizing institutionalization and promoting private care or assistance.

³⁸ Source: US Census Bureau

³⁹ Source: US Census Bureau

⁴⁰ Older People in the European Union, Oaps.html at www.leevalley.co.uk. p.1

⁴¹ Ibidem., p.1.

Although needs and resources vary greatly among the elderly in North America and Europe, assisted living will almost certainly sustain significant growth in the near future for a variety of reasons:

- Increased life expectancy of population as a whole, and of the assisted living target market;
- Decreased need for acute care by elderly;
- Increased relative wealth of elderly population;
- Decreased role of traditional substitutes to assisted living, particularly hospitals and nursing homes, as a result of cost pressures;
- Increased awareness and acceptance of assisted living services as an alternative to family care;
- Decreased time available to traditional care providers, principally family members, creating the need for alternatives.

Assisted Living - How Does It Work

Inspired by the Dutch and Scandinavian systems, assisted living programs originally offered housing and sheltered services for the frail elderly. Today, the industry provides long-term care in a homelike environment at less expensive rates than nursing homes. Elderly residents gain an ability to live a more autonomous lifestyle, while enjoying the comfort and security of on-site services, including health programs and other types of support. As residents age, their level of need increases, and the community becomes responsible for providing more complex levels of care. This is commonly referred to as "aging in place." Residents are able to customize their level of care based upon their needs.

A Merrill Lynch industry report indicates that the average assisted living community comprises 58 separate private living units.⁴² A typical resident is a widowed or single female, 84 years of age, who needs assistance with three activities of daily living. Some 30 to 40 percent of residents suffer from Alzheimer's or some other form of dementia.

Due to the focus on lower acuity care, assisted living communities can offer the elderly the level of care that is individually required at prices that are typically two-thirds of what a nursing home would charge. Most assisted living communities in the United States offer a tiered pricing schedule in which residents pay a basic rate for room and board, and are then charged additional fees depending on the level of service they select. This economic structure is beneficial for both the provider and the customer. The customer is able to obtain an individualized level of service at prices substantially less than at other higher acuity centers, like nursing homes. The provider is able to continuously serve customers as their needs change.

Assisted living companies in the United States are currently able to offer affordable services to their residents with monthly costs for assisted living (housing, meals and additional services) ranging from \$1,500 - \$3,000,⁴³ with certain markets ranging as high as \$6,000 - \$7,000. Private payers represent 96 percent of the industry's total revenue. Costs to residents could increase substantially, however, depending on the extent of future regulation. While U.S. nursing homes and other healthcare providers are heavily regulated on a federal level currently, the American assisted living industry is free of many of the costly compliance burdens of federal regulation. Regulation of the assisted living industry, however, looms on the horizon as the expansion of this industry has stimulated greater scrutiny of assisted living providers.

⁴² Merrill Lynch, *The Assisted Living Industry: An Introduction to the Sector*, April 1997, p.7.

⁴³ Jefferies & Company, Inc. *The Assisted Living Industry: The Missing Link*, August 1997, p.20

Opportunities for Hospitality

The assisted living industry is highly fragmented, with a growing trend toward consolidation. The supply of communities has been unable to keep pace with demand and consolidations have begun to accelerate. The top 50 operators in the industry housed an estimated 20 percent of the residents in 1996 until their needs required that they move to nursing homes or other higher acuity programs.⁴⁴ Providers look to gain critical mass and strengthen their presence in particular geographic regions. This environment will create opportunities for strong operators and developers with loyal employees, an established marketing process, and access to capital.

The Competitive Landscape

Competition among companies in the assisted living industry exists on three levels - national, regional and local. To effectively compete on a national level, a company may need to have a strong brand name, access to sufficient capital and an ability to effectively execute appropriate development decisions. On a regional level, a company will need to take advantage of regional demographics, maximize efficient use of resources and establish brand equity. On a local level, competition varies widely. Factors influencing the local markets include geographic location, knowledge of the elderly population trends currently and going forward and regulatory issues. Also critical are supply-and-demand forces shaping the local market in its current phase and what is expected for the future.

Marketing to Customers

To effectively position companies within key markets, it is essential to understand the distinction between the prospective resident of the assisted living community and the customer who may be an adult child caring for an aging parent. In the assisted living industry, there are unique challenges to target and market to the consumer (the potential resident of the assisted living facility). The customer, however, may be the adult child who is the primary caregiver. Most residents - or their family caregivers - choose an assisted living community within a certain radius of their family. This highlights the importance of careful target marketing to identify not only the demographics of the resident, but also of the family.

Access to Capital

As competition continues to increase, access to capital will be a major factor in success. Currently, the ability to obtain capital in the public and private markets in the United States is at an unprecedented level as investors recognize the opportunities and returns of the assisting living market. Within The last 24 months, there have been 16 public equity offerings, six convertible offerings and multiple REIT (real estate investment trust) financings by assisted living companies in the United States. In a capital-constrained environment, those companies with access to capital through relationships with strategic partners will have a competitive advantage. Again, strong hospitality entities would be able to supplement local assisted living operators.

Competitive and Market Conclusions

The fundamentals driving the assisted living industry - including the aging of populations in advanced economies and the drive to better manage health care costs - will continue to provide exceptional demand for assisted living services. Given the industry's fundamentals, a company with access to capital, strategic focus and commitment to operational excellence should be well positioned to be a leader in the market. As competition in this evolving market increases,

⁴⁴ Ibid., p.37.

consolidation will provide companies with an opportunity to expand both within their own niche of service and into other levels of the care continuum. This is particularly the case in the United States, for example, where there is currently no dominant provider of assisted living services. Although hospitality companies may have the brand equity and the operational expertise of running a housing community, it is essential for them to provide the other health - and support - related services to elderly residents. Residents of assisted living communities require more services than a hotel guest. That is the core difference between hospitality and assisted living. Competitors for elderly residents offer communities and services at all points of the senior care continuum, from skilled nursing communities and acute care hospitals, to companies providing home-based health care. Hospitality companies considering the assisted living market may want to consider partnerships with current operators. The hospitality companies can offer critical mass, brand reputation and general operational expertise, while the care-giving expertise would be provided by the assisted living company.

The prospects for providers of assisted living housing look extremely promising. The number of potential customers is rapidly rising, and they can be expected to have lengthy stays at assisted living communities. At the same time, there is currently a limited supply of assisted living communities. This all translates into opportunities for proactive companies. The hospitality industry may be one of the beneficiaries.⁴⁵

As we see, the North American approach is more market oriented and commercialized than in more socially oriented EU. However, faced with tight budgets, a recent trend in the EU countries has been to re-direct transfers from public provision of elderly care, for example nursing homes, to informal care. Informal elderly care is already a common phenomenon across the EU countries with its incidence ranging from 1-2% for 20-39 year olds peaking at over 10% (approximately 5 % for men) for over 50 year old women. The financial costs to the informal carers can be substantial, especially if the caregivers are forced to interrupt their careers or retire early in order to facilitate the provision of informal elderly care. The short-run costs of reduced or interrupted labour supply are compounded by lower collected pension entitlements in the longer-run. Caring may also increase income inequality between social classes if disproportionate numbers of lower income households provide informal care to their elderly relatives. Yet a lot of people in Europe are afraid of few trends – the need to retire in age beyond the official rate, the fall of standards of living, and lack of sufficient medical care.

Where would you like to retire to?

Lately more and more often the people in retirement age ask themselves this question.

Though in past few decades another trend is quite visible – to choose living in a country with lower life expenses, Employees in Germany, Ireland and the UK were least happy at the prospect of retiring in their home country, with around half of the respondents stating they would want to move elsewhere. In Denmark, France and Spain, four-fifths or more are content to enjoy their retirement at home.

The survey suggests that Spain could be facing a grey immigration crisis over time, altering the population balance in the country and perhaps putting a strain on healthcare resources. In addition to the 88% of Spanish nationals who intend to retire there, Spain is the first choice for a foreign retirement location in all but two of the national survey groups. Over one-eighth of employees outside of Spain said they would like to retire there.

⁴⁵ http://www.hotel-online.com/Trends/Andersen/AssistedLiving_1998.html

The only other significant European retirement destination was France, where an average of nearly 10% non-French employees said they would like to retire. France was especially popular with Belgian workers.

In France, the most popular foreign destination was Africa, while in Switzerland the USA was most popular. Other popular destinations included Italy and Australasia.⁴⁶

In a survey conducted in Europe by Aon, the human capital firm, an attempt to find answer to the “European view on best places to retire”⁴⁷ As part of a very large survey about all aspects of European retirement, *Europe’s Retirement Challenge*, the firm studied the retirement destination preferences of people from a wide group of European countries.

The results are most interesting, both from the viewpoint of where Europeans want to retire to, but also from what countries U.S. citizens might want to consider for an expatriate retirement.

Those who want to leave:

About half of the residents surveyed from Germany, Ireland, and England are ready to pack up and move to another country.

Those who want to stay:

Over 80% of the surveyed residents of Denmark, Spain, and France plan on retiring in their home country.

Where they want to move to:

Spain. Not only do 86% of Spaniards want to retire in their home country, but 18% of folks from other countries want to retire in Spain as well. It was the overwhelming choice among people from all countries seeking to emigrate (see rest of article for destinations within Spain).

France. About 10% of people from other European countries plan on retiring to France. Spain was the only other country that had strong attraction as a retirement destination, although the U.S., Italy, and Australasia held some interest.

Other countries. People from Switzerland are interested in retiring to the U.S. Some French retirees are considering retirement in Africa.

The main purpose of the Aon study was to investigate European workers’ attitudes about retirement. What might surprise many Americans who envy the comfortable social programs available in Europe is that just as in the U.S., workers here are also anxious about their ability to retire and have enough money to live it comfortably.

In the last 10 years Bulgaria became a preferred country to live after retirement mainly by British people and there are lots of places where one can find more or less compact “English settlements” – on the Black Sea coast, near it and in mountainous areas in Central Bulgarian Region. More and more Brits are choosing to make Bulgaria their permanent home, and the age profile of those settling here is slowly changing. Previously, Bulgaria attracted British pensioners in their droves with its mild climate and low cost of living. Yet, nowadays, more young families are moving here,

⁴⁶ [Europe’s Retirement Challenge](#). Expectations vs. Reality: Meeting Europe’s Retirement Challenge. AON Consulting 2010.

⁴⁷ <http://www.topretirements.com/blog/international-retirement/the-european-view-on-best-places-to-retire.html/>

lured by the safe, relaxed environment that the country provides. John and Joyce Lee left their life in the north of England in favor of spending their retirement years in Bulgaria. They left Newcastle-upon-Tyne for *Tsurkva* – a small village 10km from the Black Sea coast. The reason for their move was that John's mother and father came to Bulgaria for a holiday 40 years ago, and they never stopped talking about what a lovely time they had had. John says: "They kept going on about Bulgaria, and suggested we go for a holiday, and after we visited we grew to love it, too. We came twice on holiday, and then decided that this was the place we wanted to spend the rest of our lives." They purchased a small bungalow in June 2005, and since then they have never looked back. After years of running a pub back home, John and Joyce now enjoy a stress-free life of relaxation in Bulgaria.⁴⁸

Why Bulgaria?

Located in South Eastern Europe, Bulgaria is bordered by Greece and Turkey to the South, Romania to the North and Macedonia and Serbia to the West. Its Eastern Border is formed by the beautiful *Black Sea Coast*. The 380 kilometers of beaches are amongst some of Europe's cleanest and safest. Many of them have been awarded prestigious "Blue Flag" status. The region enjoys average summer temperatures of between 25-30 degrees. The season extends from April to October. Coupled with the renowned low cost of living it is easy to see why the Black Sea coast provides and an ideal summer destination – and is surprisingly easy to access from an ever increasing number of European Airports. Even though the Black Sea coast is an established tourist area, with resorts such as Sunny Beach attracting tourists since the late 1950's, it has recently become one of the fastest growing summer tourist destinations in Europe. So fast growing in fact that last year demands for tourist beds outstripped supply by 20%!

A country of outstanding natural beauty the environment remains unspoilt and is incredibly varied. A relatively small country, a few hours drive will take you from the snow covered central Pirin mountain Ranges to the long sandy beaches of the *Black Sea* coast. First time visitors to Bulgaria are surprised by its diversity and its stunning natural beauty. For years a real effort has been made to preserve the country's rich and unspoiled flora and fauna. As a result, Bulgaria is ecologically one of the purest countries in Europe, with exceptionally clear air and water resources. There are 7 national parks, more than 3000 protected natural sites and 17 bio-spherical reserves (the greatest recorded number in Europe). There are also 419 protected animal species and 63 protected types of plant.

Forming the heart of several of ancient histories greatest civilizations Bulgaria's rich culture is reflected in a vast number of architectural treasures. Only Greece and Italy have a greater number of historical monuments. Throughout the country there are ancient Greek sites, Roman amphitheatres and Byzantine churches. The country is home to 160 monasteries, 36 cultural centres and 40,000 listed archaeological monuments. Seven sites have achieved a coveted place on the UNESCO world heritage list.

Bulgaria is said to have one of the lowest costs of living in Europe. A wonderful meal for 2 including wine will rarely exceed around €7.00. The cost of a 10 minute journey in a taxi will only be about €2.00. Cigarettes cost just 40 cents per packet and a day out in a museum or the theatre will cost just a couple of pounds. A quality beer will cost 25 cents!

⁴⁸ <http://www.expatinbulgaria.com/articles/From-Britain-to-Bulgaria-%E2%80%93-An-easy-transition/20/1964>

Bulgaria is said to be the fastest growing holiday destination for 2005 and at least 350,000 Britons were likely to visit the summer resorts this year - nearly double last year's total. Next year three new major UK tour operators will also be offering summer holidays in Bulgaria.

The Bulgarian winter resorts like *Borovets* becomes increasingly popular winter resorts in the Balkan region. It is situated on scenic northern slopes of the Mousala Ridge in the east of the panoramic Rila Mountains. The resort lies huddled in thick pine forests some 1390 meters above sea level. The area has a long history – attracting people to ski here since as early as 1896 – taking advantage of the many pistes which rise to a staggering 2,600m! The resort is a perfect place to enjoy excellent facilities off pist as well as on the snow. Many restaurants are clustered around the well appointed and superbly equipped major hotels, making dining a real pleasure with an endless array of contemporary and traditional eating places available. *Borovets* is the perfect place to relax and provides many other recreational opportunities throughout the year. The climate is considered to be healthy, enjoying beautifully clean air, mild winter temperatures and of course mountains of snow! Usually the slopes at *Borovets* are covered in snow from mid December through to April. *Borovets* is also easy accessible- 12 minutes of first class road connects it with *Samokov*, the most sizeable town in the area. *Sofia* is just 45 minutes away. There is a regular bus transport into *Samokov* every 30 minutes and excellent links from there to the capital.

Bansko is considered by many to be Bulgaria's number one ski resort. It has the most modern ski facilities in the country and is a well-established destination for winter sport enthusiasts from all around the world. The town of *Bansko* is located 925 m. above sea level, and its ski slopes vary in altitude from 2000 m - 2600 m above sea level. It is some one hour from *Sofia*, but only 10 minutes from the bustling town of *Razlog*. *Bansko* has developed into a favorite ski & snowboard destination, but also boasts unique architecture, has many historically significant sites nearby, as well as beautiful scenery and countryside for miles around. During the recent years a multi-million Euro investment in a brand new state of the art skiing area has been made by Yulen, the company that is the licensed to provide the facilities within the *Bansko* skiing resort area. Furthermore, *Bansko* enjoys plentiful snow and therefore the season stretches from early December through to May. This is the longest season of any Bulgarian resort. During the last couple of years the resort has seen a massive investment in new prestigious hotels and recreational facilities .A brand new extension to the resort area also includes holiday apartments adjacent to the central hub of the Gondola and ski lift system. Both *Bansko* and *Borovets* have bided for 2014 Olympics

There are direct international flights from most UK airports available to *Sofia* and *Varna* all year round, with a number of airlines and direct charter flights to the *Black Sea* (*Burgas*) which are available during the spring and summer months, and *Plovdiv* during the winter. With the interest that has been shown in Bulgaria over the last couple of years, low cost airlines are expected to introduce even more regular scheduled flights there in the near future. These are a short flight from most UK airports of only 2.5 hours. In the winter there are direct flights to *Plovdiv* and *Sofia*. The major resorts and developments welcome and embrace British Tourists with open arms and the majority of Bulgarians speak English as their second language.

Britain is the major contributor to the booming tourist economy and English is the first foreign language spoken.

The property prices in Bulgaria are considerably lower than those elsewhere in Europe. A brand new apartment right on the sea front in a popular holiday town can currently be purchased for around €60,000 with rural properties selling for even less than €12,000. Buying property in Bulgaria was considered to be a great investment as prices are steadily increasing, however due to the current crisis the prices are falling.

Bulgaria has joined the EU in 2007. It is a fast growing market economy. The country is best known as a tourist destination for both summer and winter holiday makers and for its wine making. The European Union is currently investing millions of euros to help improve Bulgaria's infrastructure. Since the introduction of the currency board in 1997 Bulgaria has been a politically stable country with a developing economy. The conditions and guarantees for foreign investors have generated excellent business opportunities and investment growth potential.

Foreign nationals and foreign legal entities may acquire ownership title over buildings and limited ownership rights over property in the Republic of Bulgaria. Foreign individuals cannot own land (this is a Constitutional prohibition until they join the EU). However, the Foreign Investment Law removed the restrictions on acquisition of land by locally-registered companies with foreign participation. By setting up or joining a company incorporated under the Bulgarian legislation foreign persons can acquire full land ownership rights including ownership rights on agricultural land. Taxes for each property depend on its price. The combined State and local taxes will usually be equivalent to 2 % of the property purchase price.

A great number of Europeans, bought properties in Bulgaria as an investment opportunity or place to live after retirement. Real Estate companies advertised properties in Bulgaria for different reasons – economic, political, and climatic. One of the most cited was scenic beauty especially in the *Stara Planina* mountainside and *Black Sea Beach*, as well as in famous ski resorts like *Bansko* and *Pamporovo*. Another reason is its Easy Access; Bulgaria is just over three hours away from most British airports, the NATO membership, and joining the EU. Bulgaria's political stability, political and economic reforms are in progress in a favorable political climate. A lower cost of living, considerably cheaper expenses compared to Spain, Greece or Portugal. Incredibly low prices, just with holding deposit in Spain, one can buy a property in Bulgaria. Good climate, more than 300 sunny days per year and relatively high average temperatures. Bulgaria also has 550 mineral springs, famous through the centuries.

Bulgaria was defined as a “Next Property Hotspot”. In an article in Daily Telegraph on Britons' appetite for buying property overseas journalist *Paul Farrow* announced that *Conti Financial Services*, a leading UK overseas mortgage broker launched a mortgage scheme for Bulgarian properties following a spate of inquiries from people looking to buy in the former Eastern Bloc country.

Indeed foreign buyers can find best value for their money. ‘**A house for the cost of a car**’ - this headline was from an article that *The Sunday Times* ran in October 2004. It told the story of a 37-year-old who made her Balkan dream come true, buying a huge house in *Ustrem*, a village near the town of *Elhovo* in Southeastern Bulgaria, for just 5000 pounds sterling. For the price of a four-year-old Ford Mondeo, she got a “solid house, complete with vines, fruit trees and a 1200 m² garden”. Another argument in favour of such an investment was the fact that “a beer in a bar costs 17p, a three-course meal for two washed down with a reasonable bottle of Bulgarian wine, about £9.” Stories like this one also helped to inflate the property bubble in Bulgaria between 2003 and 2007. For many Brits, Bulgaria was the dream of a second home come true, as seen by the names of the companies they had to register to buy property in Bulgaria. The trade register is full of companies with names like Second Home, My Dream, Dream Home Invest, Bulgarian Dream Property, Dream Land, Overseas Dream Properties, Dream Destiny – all owned by British nationals and registered to buy property.⁴⁹

⁴⁹ <http://www.novini.bg/news/25456->

<http://www.novini.bg/news/25456-%D0%B0%D0%BD%D0%B3%D0%BB%D0%B8%D1%87%D0%B0%D0%BD%D0%B8%D0%BD-%D1%81%D1%80%D0%B5%D0%B4-%D0%BA%D0%B0%D0%BD%D0%B4%D0%B8%D0%B4%D0%B0%D1%82%D0%B8%D1%82%D0%B5-%D0%B7%D0%B0-%D0%BE%D0%B1%D1%89%D0%B8%D0%BD%D1%81%D0%BA%D0%B8-%D1%81%D1%8A%D0%B2%D0%B5%D1%82%D0%BD%D0%B8%D1%86%D0%B8-%D0%B2-%D0%B1%D0%B0%D0%BB%D1%87%D0%B8%D0%BA.html>

The most popular sale was village houses with a yard in the mountains and close to the seaside. A year or two later, the new fashion of holiday properties in resorts took hold. In *Slunchev Bryag* and mountain resorts like *Bansko*, *Pamporovo* and *Borovets*, properties under development were being bought off-plan. Most of them never even came to Bulgaria to see the apartment they were buying. The deals were being brokered by local and foreign property consultants that handled all the paperwork.

The global financial crisis put an end to the hopes for easy returns. Few are those that made a profit from the resale of a property in the past two years. Most have suffered heavy losses because the value of their properties has drastically decreased.

Apart from cheap property and cheap cost of living, together with a less materialistic society, most cite better climate and a more traditional way of family life as their top reasons for choosing Bulgaria.

At the peak of the property bubble, apartments with a view of the sea reached up to 2500 euro per m² and the average price of a village house with a yard was 30 000 euro. Now prices are halved. Apartments in *Slunchev Bryag* can be bought for 400 euro a m² and the average price of village houses is between 14 000 and 15 000 euro.

Cheaper homes also mean that many foreigners can sell their property, buy in Bulgaria and still have money in the bank. Bulgaria can offer a retirement (or early retirement) lifestyle which many of them want.

If their number increases it will have a considerable impact on Bulgarian society and culture in positive way creating not only cultural bridges but also a model of intercultural dialog. Yet a lot have to be achieved as most of them (British mainly) are “scattered” in small villages in Central Balkan region, *Elhovo* (Yambol), and Black Sea coast. They do not represent an informal group by themselves and rarely participated to local life. But when they do so, they create models for social behavior that they have at home but are not yet rooted in Bulgaria with its short statehood tradition in Modern time – it was only 135 years after the country was liberated from Ottoman Empire. Britons usually initiates the activities for preserving local Cultural Centers, improving and repairing warn-out buildings (in *Elhovo* for instance), implying charity actions to help elders’ in local state Elder’s Houses that are in poor condition or helping children in Orphanages.

It was only during the last local elections when Britons start articulated their desire to participate actively in local governments and to be elected in municipalities. An example is Derek Edward Marny who run a campaign during 2011 local elections in small town of *Balchik*. He is among other foreigners came from EU country to live in Bulgaria who expressed their vigour of purpose to work for the local government. He was 4th in the list of ethnic Rome’s Party called DROM. “Derek Marny is a very energetic and politics is in his blood”, said the local party leader Ridvan Demir who asked English man to join the Party list. Previously Derek Marny, who lives in resort town of *Balchik*, already was a municipal councillor in his country. Here in Bulgaria he has helping the poorest and less educated Roma community in his neighborhood providing jobs and assistance to them. Local Roma leader believes that Derek will help for the inclusion of Bulgarian Roma in the EU.⁵⁰

⁵⁰ <http://www.novini.bg/news/25456-%D0%B0%D0%BD%D0%B3%D0%BB%D0%B8%D1%87%D0%B0%D0%BD%D0%B8%D0%BD-%D1%81%D1%80%D0%B5%D0%B4-%D0%BA%D0%B0%D0%BD%D0%B4%D0%B8%D0%B4%D0%B0%D1%82%D0%B8%D1%82%D0%B5-%D0%B7%D0%B0-%D0%BE%D0%B1%D1%89%D0%B8%D0%BD%D1%81%D0%BA%D0%B8-%D1%81%D1%8A%D0%B2%D0%B5%D1%82%D0%BD%D0%B8%D1%86%D0%B8-%D0%B2-%D0%B1%D0%B0%D0%BB%D1%87%D0%B8%D0%BA.html>



Kate and Mark: “We choose to stay here.”⁵¹

Another British couple Kate and Mark also actively participate and influence the local community where they lived for two years. “Two years ago” said English family, “we came to Bulgaria because it’s beautiful nature and the quietness of life, natural products and good relationship between people”. They live in village of *Dragoevo*, Shumen Region, during the meeting with Rossen Plevneliev in his candidate presidential campaign. The British family told that they feel perfectly here and that in village they live is a multiethnic community of Bulgarians, Turks, Roma’s and already Britons. According to them there is just a little bit that have to be done for the well fairs of the village and the region.⁵² The main problem there is the infrastructure and the rehabilitation of the road between *Shumen* and small historic town of *Preslav*. They were promised to have a good road up to 2013 when the state budget will cover the improvement of the roads in the region. And this is only the beginning. The more “European Communities” be created in the country, the stronger will be the impact of transition of values and ways living in developed democracies, the more values and societal experience will be transferred to the local life, the better functioning of local institutions can be expected. Thus the coercion between so different cultures being “split” during the history will be re-created and strengthened with positive results for the Bulgarian society as a whole.

⁵¹ Photo is taken from: http://dariknews.bg/view_article.php?article_id=784132 October 1, 2011.

⁵² Rossen Plevneliev, on the right in the picture, is current President of the Republic of Bulgaria.

The Elderly European citizens in House of *Salasuka* undoubtedly will create such “gravity” for the cultural “gives and takes” thus contributing to the functionality of a model for intercultural dialog.

A Model for Intercultural Dialog

“Each community, by means of its collective memory and consciousness of its past, is responsible for the identification as well as the management of its heritage. Individual elements of this heritage are bearers of many values, which may change in time. The various values in the elements characterize the specificity of each heritage. From this process of change, each community develops an awareness and consciousness of a need to look after their own common heritage values.”⁵³

Communication that crosses cultural boundaries can be fraught with misunderstanding. Gestures and language that mean one thing to you can mean something entirely different to a person from another tribe or tongue. A globalized economy has brought greater diversity to communities that were once singular in their ethnic composition. Ignorance of history and experience can lead to comments that ignite old wounds, or worse, offend outright. Fortunately, common living can help to overcome cultural borders – visible or invisible, to facilitate mutual understanding and respect.

During the past decade Europe has experienced an increase in cultural diversity caused by growing transnational mobility of people, and this development is expected to continue. Demographic pressures have an important part to play here. Despite the emergence of cultural diversity, very little is known about how people of different national and cultural backgrounds can learn to live and work together.

Multicultural integration is a reciprocal process where the members of the mainstream population, established minorities and the newcomers learn to interact and encounter each other constructively, in order to enhance the creation of a ‘strongly’ multicultural society.⁵⁴

The *Central Balkan Region* of Bulgaria, where *Salasuka* village is located has been imposed in collective memory as a place that best preserves and keeps the historical heritage preserving details of traditional architecture. Few open air museums and ethnographic complexes display it to the visitors and tourist, more over shapes the taste of new settled residents in the region that are mostly from Britain. The neighboring houses to the plot under consideration are good examples of this resent phenomenon.

The Central Balkan Mountains Region contains a group of historic towns that represent a precious heritage of stone walls and popular architecture located in a natural environment with agricultural and cultural landscapes. The place confers strong identity and a deep sense of belonging to its inhabitants.

In this context we propose to strengthen synergies in order to coordinate and strategically improve different cultural heritage initiatives. An innovative global vision was created to improve citizens’ quality of life, supported by public-private support.

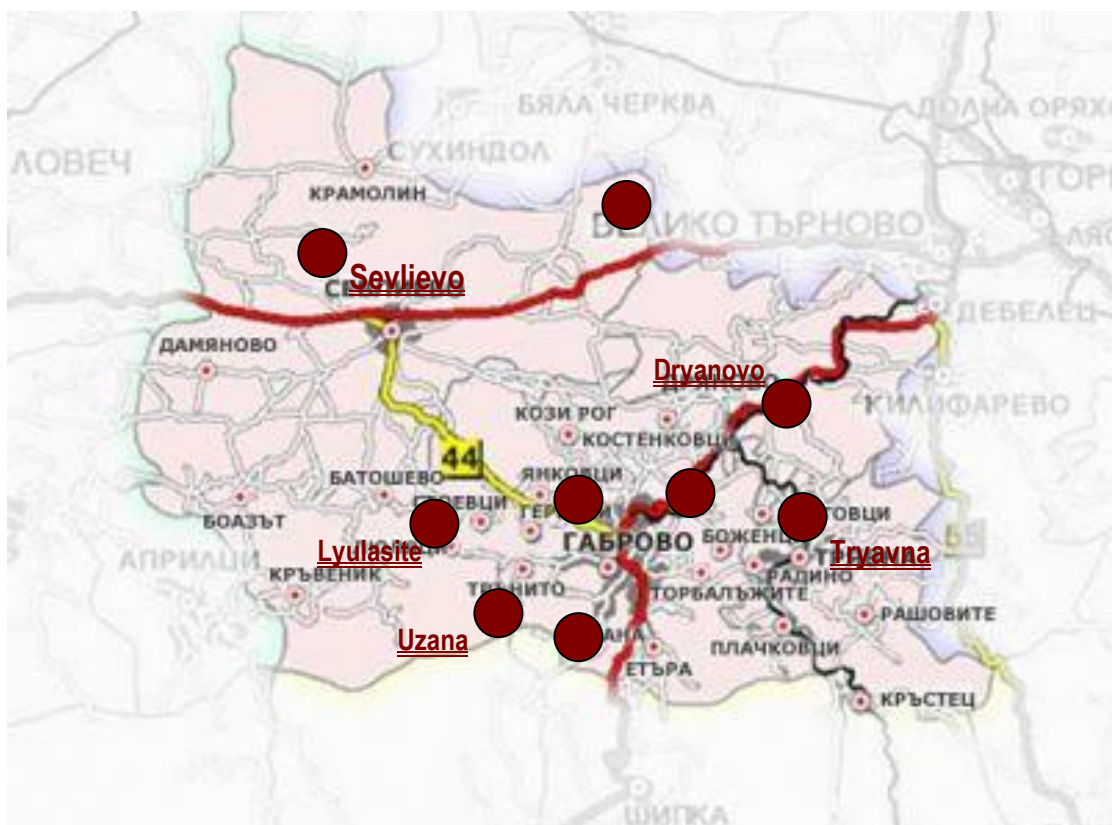
⁵³ Kraków Charter 2000, Principles for Conservation and Restoration of Built Heritage, Kraków – Wawel, 26 October, 2000

⁵⁴ Grillo, R.D. (2001). Transnational migration and multiculturalism in Europe. Transnational communities programme. WPTC-0-08. Working paper series (Ed. by A. Rogers). University of Oxford, www.transcomm.ox.ac.uk/working_papers.htm

Historic towns and villages, in their rustic terrain, represent an essential part of our national architectural heritage while a considerable part of them are in the UNESCO list of World's Heritage. They should therefore be seen as a whole, with the structures, spaces, and human factors in the process of continuous evolution and change. This involves all sectors of the population and requires an integrated planning process, encompassing a range of different activities.

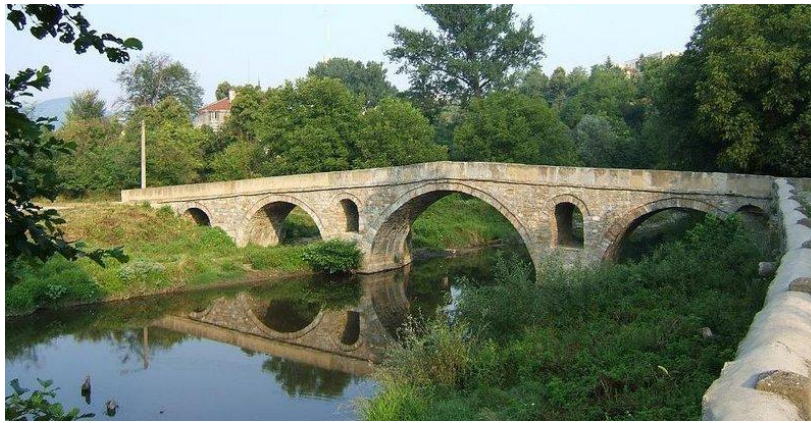
Cultural heritage management has the potential to integrate networks of small and medium-sized heritage towns, stimulating social, environmental, and economic interaction and also improving diversity and unity.

In this context, the small towns' morphological, functional, and structural whole, operating as part of their territory, citizens, economy, environment, and surrounding landscape. There are couple towns with similar characteristics in this area – *Veliko Tarnovo*, *Dryanovo*, *Tryavna*, “*Etara*” - Open Air Museum, *Bojentsi*, and villages like *Peyna* with permanently decreasing population but revitalized by efforts of old and restored houses owners to attract tourist and develop cultural tourism in the area.



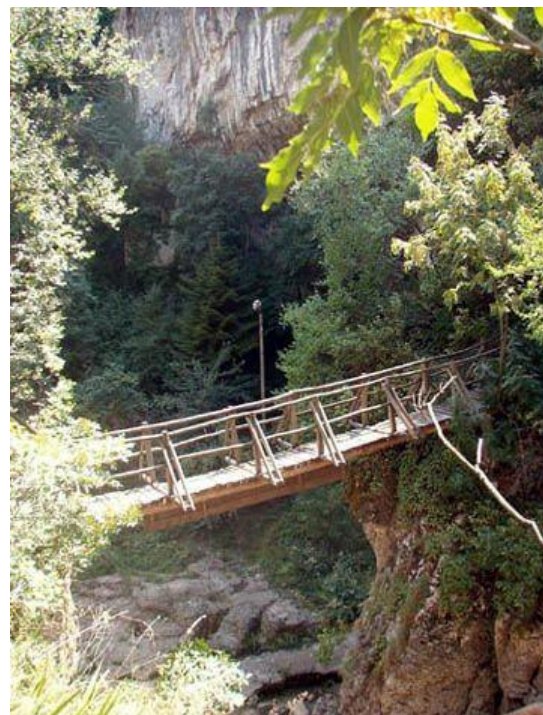
Possible network of small towns that are natural reserve for traditional 19th Century Bulgarian Architecture and pool for cultural tourism in the region

Dryanovo is one of the loveliest places in Bulgaria with potential for cultural tourism. Much can be told about the Dryanovo region, but the told words have not the same value as the experience. The Dryanovo region has one rich cultural and historic heritage and wonderful nature. In Dryanovo you can take pleasure from the splendid creations of the great master *Koliyo Ficheto* – Saint Nikola church, a cultural monument built in the middle of 19th century, The *Bridge over Dryanovska River*, *Ikonomova kushta*, where are permanently exposed around 150 icons from Dryanovo region.



The Bridge over Dryanovska River

The *Dryanovo Monastery St. Arhangel Michael*, which hides in so many histories, became a battlefield for the Turkish military units and the battle group of *Bacho Kiro* and *Pop Hariton* during The April Rebellion. In the monastery has been found one of the first hand-written copies of *Paisii's Istoriya Slaviyanobulgarska* (Slavonic-Bulgarian History). The *Bacho Kiro cave*, where are found one of the oldest trails on The Balkan Peninsula. Electrified and approachable for tourists, it reveals its endless galleries and corridors in a combination with impressive rock forms. On the territory of the *Dryanovo Monastery* there are two eco-trails that reveal a unique view from the edge of the rocks, which embrace the monastery. The museum exhibitions have preserved the way of life, the history and the art creations of the masters from the Revival period in The *Dryanovo* region. Hotels, guest houses, swimming pools, a hovel and a camping site on the bank of *Dryanovska River* in the core of The *Dryanovo Monastery*, expect their tourists.



Bacho Kiro Cave and eco-trail nearby the cave



Ikonomovata Kashta



Revival Period House in village of Gantsovec



Dryanovo Monastery

Veliko Tarnovo is a city in north central Bulgaria and the administrative centre of Veliko Tarnovo Province. Often referred to as the "*City of the Tsars*", Veliko Tarnovo is located on the *Yantra River* and is famous as the historical capital of the Second Bulgarian Empire, attracting many tourists with its unique architecture. Until 1965 the name of the town was Tarnovo, and this is still the common name. The old city is situated on three hills, Tsarevets, Trapezitsa and Sveta Gora rising amidst the meanders of the *Yantra*. Tsarevets housed the palaces of the Bulgarian Emperors and the Patriarchate with the Patriarchal Cathedral, as well as a number of administrative and residential edifices surrounded by thick walls. *Trapezitsa* was known for its many churches and as the main

residence of the nobility. In the Middle Ages it was among the main European centres of culture and gave its name to **the architecture of the Tarnovo Artistic School**, painting of the Tarnovo Artistic School and literature. *Veliko Tarnovo* is an important administrative, economic, educational and cultural centre of Northern Bulgaria. As of February 2011, the town has a population of 68,197.⁵⁵



Tsarevets and Stara Planina as seen from the village of Arbanassi. (Pavel Gramatikov's photo.)



Tsarevec Hill in Veliko-Tarnovo

⁵⁵ Sources: National Statistical Institute



Samovodska Charshiya, Old Veliko Turnovo, Toma Dimov's photo.

Tryavna is a town in central Bulgaria, situated in the north slopes of the Balkan range, on the Tryavna river valley, near Gabrovo. It is famous for its textile industry and typical National Revival architecture, featuring 140 cultural monuments, museums and expositions. The town is the administrative centre of the eponymous Tryavna Municipality. As of December 2009, it has a population of 9,831 inhabitants.

The village was founded as early as the Thracian Era. However, the first documents of its existence date back to the 12th century. During Ottoman Bulgaria period locals defended the pass and enjoyed privileges for this reason. Only Bulgarians lived in the town. During the period of Bulgarian National Revival, the town was heavily involved in the development of crafts. Houses from this period feature their own architectural design. The ground floors had irregular forms and housed craftsmen and traders. The upper floors featured wooden bow-windows, the roofs were covered with well arranged rocks.

The Kalinchev house, also in the old part, has been transformed into an art gallery, offering the collection, donated by Totio Gybenski. The Museum of icon painting and woodcarving with its collection of over 160 original icons, painted by well-known masters, is housed in the Tsar's chapel at a distance of the town center.

The unique Museum of Asian and African Art is housed in the old public bath, on the riverside. Tryavna is proud with its great samples of the woodcarving, icon painting and original architecture. Today the town is a preferable tourist spot, featuring modern hotels, private lodgings and villas, restaurants and taverns. There is also an Art school where successors of the old icon painters and woodcarvers master these crafts.

The *Voneshta voda* village resort, famous for its healing mineral springs, is located 20 km away from Tryavna. *The Bulgarka Nature Park* is located in the *Starina Planina*, south on the city. The town is well connected with the whole country thanks to its excellent road network and railway station.



Typical Tryavna House from Revival period.



Tryavna House



Tryavna – Tsharshiyata (Shopping Area)

The *Etar Architectural-Ethnographic Complex*, usually referred to **Etara**, is an open-air museum and a neighbourhood of Gabrovo (8 km south of its center) in northern Bulgaria. It is located on the northern edge of the *Bulgarka Nature Park*, between the park and the city of Gabrovo. It presents the Bulgarian customs, culture and craftsmanship. It spans over an area of 7 ha and contains a total of 50 objects, including water installations and houses with craftsmen's workshops attached. As a whole, the complex's goal is to illustrate the architecture, way of life and economy of *Gabrovo* and the region during the Bulgarian National Revival.

The museum's construction started in 1963 under the direction and project of Lazar Donkov. The pre-existing *Karadzheyka* water-mill, built around 1780, was thoroughly reconstructed, with the other objects being constructed later. The complex was opened on 7 September 1964 and proclaimed a national park in 1967, as well as a monument of culture in 1971.

The park features typical Bulgarian revival houses with two floors, bay windows, a clock tower, and a beautifully decorated house by Saakov featuring 21 windows. Using original instruments and following the old traditions, locals represent around 20 characteristics of the regional crafts such as wood-carving, pottery, coppersmith crafts, furriery, cutlery making, needlework etc. There are shops for souvenirs; tourists can enjoy the luxury of a local three star hotel with a bar and a restaurant. There are numerous restaurants in the park where tourist could enjoy the delicacies of local Bulgarian cuisine. There are visitors to the park, from all over the world, all the year round, especially during the annual Christian festivals celebrated in the park, namely, Palm Sunday and Easter. A tourist can become a first-hand witness of these festivals, and observe local traditional rituals.



Architectural-Ethnographic Complex "Etara"



Etara



Etara Walk

Sokolski Monastery is situated just several kilometers away from *Etara*. It was founded in 1833 and named after its founder Yosif Sokolski. It is located 15 km southwest of Gabrovo on the northern slopes of the Balkan Mountains in the *Bulgarka Nature Park* and is close to the *Sokolovo cave*.

Originally, a small wooden church was built in 1833 and the frescoes were finished a year later. Hristo Tsokev, a Gabrovo-born artist, donated the church icon, which represents the Virgin Mary and Christ and is considered to be miraculous. In 1862, Father Paul Zograf and his son Nikola from the village of *Shipka* decorated the church with frescoes. The monastery has a big yard surrounded by residential and utility buildings. In the centre of the yard, in 1865 the master Kolyu Ficheto constructed a big stone fountain with eight taps. The whole monastery was built during the Bulgarian National Revival with the strong support of the people of Gabrovo and the local villages. The monastery played an important role during the April Uprising. In this monastery, the leader Tsanko Dyustabanov formed a group of volunteers for the resistance. In a short period of time during the Russo-Turkish War of 1877-78 the monastery was a hospital. The *Sokolski Monastery* was declared a historical site in 1973.



Sokolski Monastery Church and Yard

Gabrovo is a city in central northern Bulgaria, the administrative centre of Gabrovo Province. It is situated at the foot of the central Balkan Mountains, in the valley of the Yantra River, and is known as an international capital of humour and satire (see Gabrovo humour), as well as noted for its Bulgarian National Revival architecture. Gabrovo is also known as the longest city in Bulgaria, stretching over 25 km along the *Yantra*, yet reaching only 1 km in width at places. The geographic center of Bulgaria - Uzana is located near the city. According to Census 2011, as of February 2011, the population of the town was 58,950 inhabitants.

These days the House of Humour and Satire continues carrying out its MISSION - *"to encourage the creation of humorous art works by holding international and national competitions, exhibitions and other fora; to preserve and popularize the world humour heritage recognizing the identity and humour traditions of each nation; to mediate through the power of universal humour and throw bridges between opposing sides in the name of tolerance, understanding and mutual respect amid the peoples in the world."* But Gabrovians and the House are unlikely to turn their backs on their ancestors - the hardworking mountain people - and their maxim *"...when something becomes the talk of the world, in Gabrovo it is already in the work."* Therefore, they have secured their future reserving a piece of land far beyond the planet Earth - just in case. It is the Minor Planet GABROVO No 2206 discovered on April 1st, 1976 and named after the town whose humour folklore and traditions have made it famous all over the world!

During Ottoman rule, the rich tradesmen spent plenty of resources for the small town's public planning. The first Bulgarian secular school, the Aprilov National High School, was founded in

Gabrovo in 1835 with the aid of Vasil Aprilov and Nikolay Palauzov. Gabrovo was officially proclaimed a town by the Ottoman authority in May 1860.

Shortly before and after the Liberation of Bulgaria in 1878, Gabrovo developed as a centre of industry on the basis of its economic traditions. Joint-stock companies emerged, factories were constructed and connections to the large stock exchanges were created, prompting some to label the city "The Bulgarian Manchester". It was visible in the early 20th century architecture (see photo below).



Regional History Museum in Gabrovo – early 20th century architecture



Gabrovo architecture of early 20th century

Internationally known as a centre of humour and satire, Gabrovo has two theatres, the Racho Stoyanov Drama Theatre and the puppet theatre, a House of Humour and Satire that serves as a cultural institute, a centre, museum and gallery to popularise comic art. There is also a cinema, Aleko Cinema, and a number of museums and menorial houses both in the town and around it, most notably the Etar Architectural-Ethnographic Complex and the National Museum of Education at the Aprilov National High School. A planetarium is also in operation. Gabrovo is twinned with the Belgian town of Aalst and Mogilev in Belarus.

Bojentsi, also variously transliterated as Bozhenci, Bojenci, Bojenzi, Boženci, Bojentsi, Bojentzi, Bozhentzi, etc.), officially but not commonly **Bozhentsite** (Боженците), is a village and architectural reserve in Gabrovo municipality, Gabrovo Province, in central northern Bulgaria. The village lies in the middle part of the Balkan Mountains, 15 km east of Gabrovo and just north of the Shipka Pass. It is noted for its well-preserved Bulgarian National Revival architecture and history, and is thus a well-known tourist destination in the area.

Bozhensti was established after the incursion of Ottoman Turks in Veliko Tarnovo, the former capital of the Second Bulgarian Empire, in the 16th century. Many residents of the capital then fled to settle in remote and secure parts of the mountains. According to the legend, among them was the young female noble (bolyarka) Bozhana, who chose to hide in the area where the village today is, and gave it its name. The noble's sons engaged in trade and the village gradually grew to become an important trade junction during the National Revival towards the middle of the 18th century. The main production consisted of leather, wool, beeswax and honey.

The village of *Bozhentsi* was announced an architectural and historical reserve in 1964 and is part of **UNESCO's cultural monuments**. The National Revival architecture has been preserved in Bozhentsi due to this, and there is a ban on the construction of any buildings that do not fit with the village's style.

As the settlers during the Ottoman rule were mostly wealthy people, many of the houses have two storeys, the first being used as a cattle-shed and the second being inhabited by the owners. Characteristic features of the Bozhentsi architecture are the verandas, the stone-plate roofs, the corner fireplaces and the ceiling woodcarvings. The pavement of the streets in the village is only cobblestone.

The Prophet Elijah basilica, featuring a nave and two aisles, is a remarkable example of the National Revival style. Domes can be seen hidden under the ceiling, as well as massive stone walls and the typical Bozhentsi arches. The church was erected in 1835, and the village's influential residents were allowed to construct a belfry, which was usually strictly forbidden by the Ottoman authorities.



Kolyo Ficheto Bridge in Byala village

Bulgarian craftsman *Kolio Ficheto* started the construction of a bridge over *Yantra River* near the town of *Byala* in 1867. Construction was set to begin in 1865, when local Ottoman ruler *Midhat Pasha* demanded the creation of the bridge. His idea was to create a facility that will connect *Rousse*, *Veliko Tarnovo*, *Botevgrad* and *Sofia*.



Bojentsi houses



Bojentsi – sample of typical Revival Architecture at the Central Balkan Region

Uzana is the winter resort that is located near the *Bulgarka Nature Park* and the *Central Balkan National Park* in the *Stara Planina*. It consists of large meadows surrounded by forest.



Uzana – Geographical Center of Bulgaria

The altitude varies from 1,220 to 1,350 m. The longest run is 4,265 ft /1,300 m. The nearest big city is Gabrovo, some 22 km away. Uzana is also the **geographic center of Bulgaria**. The resort with its 15 hotels provides tourism opportunities throughout the year.

The surrounding sites of Uzana are suitable for speleologists and rock climbing. There are possibilities for cultural tourism in the region. In the nearby open-air ethnographic museum *Etara* people can learn more about Bulgarian crafts. The *Sokolski Monastery* is situated a few kilometers away from *Uzana*.

Tourism in the *Uzana* region started in 1937 when the first chalet also named *Uzana* was built on the southern side of the meadow.

Uzana is a home of rare floral species included in the **Red Book of Endangered Species**. It is the starting position of many mountain routes as well as the picks of *Shipka* and *Buzludja*.



Shipka

The National Monument Of Freedom at the Shipka Peak is built on the place where one of the most deciding battles for Bulgaria's liberation from the Ottoman Empire took place in 1877-1878. This is the place where the Turkish soldiers tried to cross the pass during the 1877-1878 war between the Turks and the Russians, with 5,000 Bulgarian volunteers taking part. Today the Monument Of Liberty is the national monument that symbolizes liberation and freedom - the final birth of the Bulgarian nation and independence.



Buzludzha

To the east of Shipka peak rises up another historical peak named Buzludja. At its foot died the hero leader Hadji Dimitar. On 30 of June 1868 he fought against numerous enemies with his small detachment. In memory of this heroism a monument was erected in 1961 – the monument of Hadji Dimitar. The imposing figure of the hero is made of white stone from the Vratsa region. In 1891 the socialists led by Dimitar Blagoev assembled secretly in the area to form an organized socialist movement. In honor of this act was built the *Buzludzha* Monument, one of the symbols of the socialism in Bulgaria as seen on the photo.



Buzludzha Monument is in ruins now

Peyna Guest House in Peyna village

In the Old-Bulgarian holiday complex *Peina* you can escape from the intensive daily round. The place is situated in the foot of the mountain Stara Planina, 400 m over the sea level, in an extremely clean, virgin area in the center of Bulgaria. It is just 3 km from Dryanovo. The complex brings back in the atmosphere of the middle of 19th century and will present you the material and mental culture of the Bulgarian people living that time.



Peyna complex from outside and inside

Lyulatsite is an example of renovation of a standard building into a modern spa facility. *Lyulyatsi* SPA Hotel offers 121 beds in 17 single rooms, 44 double rooms and 8 suites. It has a restaurant with a garden, a daily lobby bar with nursery room, a night bar and a conference hall with 150 seats at visitors' disposal. The sports admirers could play tennis table, billiard and monics. During the winter, the hotel offers a ski-room for those who would like skiing. The resort is recommended in following cases:

- chronic unspecific diseases of the lungs in remission
- cardiovascular diseases in remission
- functional nervous breakdowns
- diseases of the peripheral nervous system, cerebralvascular diseases - insults
- some kinds of endocrine diseases

The complex is equipped with physio-therapeutic and therapeutic rooms. The center for treatment and rehabilitation is supplied with electric cardiographical apparatuses and other contemporary medical appliances, baths for underwater massage, lye therapy and paraffin treatment; fitness saloon, sauna, solarium and massage hall.

Mineral Springs - The spring water is low mineralized.

Tourists Services - the sports admirers can use a tennis-court, football and volleyball ground, a "path of health". In winter is available a small ski-track with a rope-line. There are perfect conditions for cycling and walking tours. There is also a play ground, which is especially established for children. *Lyulyatsi* offered also a Program for losing weight - diet, sauna, massage, tangentor, fitness, sport dancing, and treatment through particular location (spot treatment and Aromatherapy - herbal bath, sauna, and massage).



Lyulacite Spa Hotel

From all of the above said we can conclude that the region represents a rich pool of architectural Bulgarian heritage, an important historical background for our day's community developments. It is not by chance that almost all Britons settled in the region choose to buy houses in National Revival Style or to build a kind of replicas of it. The most popular example is the Jacky and Bernard's House in *Salasuka* village they turned into a *Harlequin Guest House* situated in this quiet village location, with un-spoilt views of the valley and mountains that surround it. The House is in *Salasuka* just off the main road, approximately half way between *Veliko Tarnovo* and *Gabrovo*. Undoubtedly, this is how the cultural fusion is started and cultural bridges are built.

Cultural Bridges

These development goals are challenging. Hopefully the *Central Balkan Mountains Region* in general and co-habitation and cooperation between local peoples with newcomers from EU countries will create a multipolar model for cultural heritage revitalization will leave a positive impression in its territory and its citizens. This inevitably led to increasing cultural interaction and building cultural bridges in a concept of united Europe as a common Dome.

The dynamics of re-settlement of elders' people after retirement from North to South (or from Western to Eastern part of Old Continent) allow us to look from anthropological perspectives in a world of rapid cultural transformation. I focus on the increasing demand to design for different cultural environments and the considerations necessary to meet these requirements.

Our world is changing ever faster and in the last decades the term "globalization" has entered almost every contemporary debate in a variety of fields. Although present in some form in earlier phases of history, globalization in current discussion has gained a considerably different meaning. Rapidly increasing worldwide interaction through phenomena such as the media, migration or tourism forces almost every discipline and profession to reconsider and to react. Dealing with an ever more interdependent world urges us to finally integrate developing countries into global considerations, stopping the long lasting construction of Western elites leaving important developing tasks out on the margins.

This requires new thinking in broader terms – also in the discipline of architecture. Contemporary architects have to face a world without certainties to base their work on. They are left in a terrain that is unknown to them and the results of their designs are as unsound as their orientation in a culturally unknown landscape. Long established design guidelines such as locality, place, climate and available building materials have to be reconsidered and placed into a wider context. So far the only reaction has been a worldwide confusion and the escape into an explosive variety of “-isms” and stiles.

The only one certainty left in architecture nowadays is that architecture is designed for the people who live in it, work in it, and are represented through it. Architecture is a major tool to express culture, identity and the ideology of people. Architecture is a physical statement of anthropology. And it is the field of anthropology that has put more effort into cultural studies and the overall understanding of the human being than any other discipline. Throughout its existence, anthropology has developed research methodologies that have found useful application in a variety of subjects. Also architecture is too important to leave it to architects alone. Anthropological methodology can provide a most helpful tool to the architect, particularly in tracing the major wants and needs of the people the design is based on - and anthropology can thus provide a central theme to hold on to, no matter what style and expression the architect chooses. Throughout a theoretical cross-cultural-study we may acquire a holistic approach that can be expressed as “anthropological pre-design study”.

In developing regions planning strategies still put an overemphasis on the utilitarian dimension, namely, on economic and technological advances, whereas it is overdue to put fresh emphasis on the cultural, aesthetic and spiritual dimension to gain basic acceptance among the people. Architects and planners need to go back to the people as the focal point of all activities. A common conceptual framework of the two disciplines is clearly important in order to gain more satisfactory results regarding the building process in developing countries. A new phenomenon to deal with is the enormous speed of the current transformation process which creates unknown problems in all spheres of life, housing being one of them.

The creation of new needs is a fundamental requirement for reformation, social change, intellectual shift and alike and thus it is a phenomenon which – to state it in a simplified version - promotes both materialism and individualism. Along with this comes a transformation of attitudes towards the house. Because of the tension between cultural homogenization and cultural heterogenization, architecture also has gained a new meaning as a symbol of identification.

A. Strategic Position

On this basis it is possible to develop and apply a multipolar model to revitalize the preservation of heritage and the territory more broadly, integrating natural and cultural heritage as an active agent of development; understanding the region as the physical framework for an inclusive society; and enhancing people's capacity to transmit knowledge from generation to generation.

B. Contextual Analysis

Previous studies had been carried out to identify some crucial strengths and opportunities in the following areas:

Environmental: High environmental quality of the whole territory; high quality of natural resources; high quality of landscapes; strong local identity reinforced through landscape elements; perception of the territory as a bridge between towns and rural environments; dynamic local stakeholders in the preservation of natural and cultural heritage.

Regional: existing network of head and complementary urban settings; good transport infrastructures; multiple roads with historic interest; proximity between different urban settings; agricultural activities; industrial parks; medium size cities that could cooperate in territorial regeneration.

Urban: an important heritage of stone walls and popular architecture in fine condition; consolidated urban structures; networks of public spaces; homogeneous scale; attractive special architectural sequences; emblematic buildings and powerful elements of identity; close relationships with the rural environment; the archaeologically valuable irrigation system from a Paleolithic society.

Social: high quality of life and healthy environment; strong identity and sense of belonging from the citizens and the young people who live in big cities and return to their town origins for weekends and holidays; deep-rooted cultural tradition linking cultural and natural heritage; cooperation between different organizations of regional towns; active cultural organizations.

Economic: There are almost no industrial background and population rely on the development of cultural tourism. Slowly but in increasing number the Guests Houses and BB, the motels, small hotels and other attractions based on tradition and heritage appear in the last 5 years. The proximity to bigger and more popular internal and external tourist places stimulates the efforts in this field yet the lack of investment potential makes this processes slower then one may desire. There are some threats and weaknesses that presently exist as follow:

- limited perception of the value of the cultural heritage;
- lack of professional and legal measures to protect the cultural heritage;
- few complementary relationships between different urban settings;
- deterioration of built heritage because of lack of fund for restoration and preservation;
- deficient urban equipment on town and territorial scales;

- lack of articulation between spatial sequences;
- deficient communication elements, such as signs and directions;
- absence of special activities for different group of citizens;
- depopulation and increase of elderly citizens;
- low GDP;
- difficulties in generating new economic dynamics;
- low occupational training.

C. Urban and Territorial Strategies: Multipolar model and Multidisciplinary approach

The starting point for defining the strategic position of the Central Balkan Mountain Region is to recognize our principal objective, cultural heritage revitalization, and also the potential number of citizens, tourists, and investors involved. At the same time, it is vital to identify the stakeholders, to develop a benchmarking study, and to review the preliminary studies. Considering a holistic approach, combining a multipolar model of urban-territorial regeneration and management with a multidisciplinary vision. The multipolar model stimulates complementarities between the cultural heritage of the territory and the different historic towns. The multidisciplinary vision translates this strategy into tangible and measurable objectives focused on sustainable outcomes. This approach may well certify the value of this strategy as a powerful tool in the sense that it can generate positive cultural, social, environmental, and financial externalities.

I. Small- and Medium-Scale Towns Network: Sustainable Interaction

In establishing the strategy for the achievement of the overall vision, it is necessary to define several objectives. One of them will be to involve the actors most affected by the objectives to be achieved so that they will become willing contributory partners in the process. These actors include: citizens, public administrations, technical experts in various disciplines, and the private sector. It seems particularly relevant to engage the interest and involvement of citizens and public administration in this work, as they represent the areas where the current problems lie and the areas that can provide the testing ground for each of the innovations mentioned before. Moreover, they will be the greatest beneficiaries of a successful outcome to the multipolar model proposed. In a parallel way, it is important to set down the main areas for research that will support the implementation of the objectives. These will inevitably overlap in several aspects and will contain themes on which, in some cases, continuous work will be required. Other themes will follow a critical route, where additional investigations must be completed before the main research work can begin. The small and medium-scale towns' networks, as well as the creation of hubs and actions looking for a sustainable interaction, consolidate a driver project, and they will present a new way of cultural heritage rehabilitation.

What makes a sustainable community?

According to the RIBA⁵⁶ the following criteria makes a community stable:

1. A flourishing local economy to provide jobs and wealth – at present stage the local economy suffers of stagnation and unemployment. The residency of citizens from EU or other regions with higher standard of living will help to some extend the trading with consumer goods.
2. Strong leadership to respond positively to change – unfortunately, the local (municipality level) leadership is lack of any policy of inclusion of new-comers with local community. The language is also a barrier to build the mixing of cultures.

⁵⁶ ODPM report 'Sustainable communities: building for the future', p 4.

3. Effective engagement and participation by local people, groups and businesses, especially in the planning, design and long term stewardship of their community, and an active voluntary and community sector – this is non-existent and the Westerns that came from societies with deep traditions may be a catalysts of those activities, especially volunteering.
4. A safe and healthy local environment with well-designed public and green space – this is most attractive aspect of the region under consideration;
5. Sufficient size, scale and density, and the right layout to support basic amenities in the neighbourhood and minimise use of resources (including land) – its all available and is in close neighborhood;
6. Good public transport and other transport infrastructure both within the community and linking it to urban, rural and regional centres – the transportation between villages is almost non-existent however this is not an obstacle as newcomers own cars;
7. Buildings - both individually and collectively - that can meet different needs over time, and that minimise the use of resources – this is among main aims of the architectural project;
8. A well-integrated mix of decent homes of different types and tenures to support a range of household sizes, ages and incomes – it is the picture at the region;
9. Good quality local public services, including education and training opportunities, health care and community facilities, especially for leisure - exists;
10. A diverse, vibrant and creative local culture, encouraging pride in the community and cohesion within it – strong and concentrated in the local Cultural Community Centers; historic places and other sightseeing's are on a distance of 20-30 km.
11. A "sense of place" is very strong with scenic views of Balkan Mountain – *Stara Planina*, and historically inherited tradition in architecture very well preserved there ;
12. The right links with the wider regional, national and international community

Environmental impact is very strong and positive and easily observed.

Renewable energy generation needs to be incorporated into a development early – there are small areas of photovoltaic and biogas installations already built. Locally produced food and local shops can reduce the amount of embodied energy used in ‘food miles’.

Design

Townscape and landscape:

The need to create a high quality townscape with an accompanying approach to landscape in the planning of new or extended communities cannot be understated. It is vital to establish a broader sense of community and create other opportunities for civic, commercial and cultural activities that engender collective pride. Townscape is of appropriate quality to reflect the character and aspirations of the community and contributes to its identity. The natural habitat within towns is to be enhanced by careful and considered design. It is necessary to rise to the challenge of designing successful townscapes we must look to the past as well as the future.

The existing historic and cultural context of townscape in the area being described earlier in this chapter is an important context for the developing intercultural communities.

Buildings and facilities

The Sustainable communities programme should deliver healthy, comfortable, low environmental impact buildings. Healthy ecological homes and workplaces, achieved through informed design and utilising bio-climatic and passive techniques, along with best technology, are possible now. The use of fossil-based energy supplies during the life of the building should be minimised along with the embodied energy content at construction stage. Design strategies for good daylighting and natural ventilation are required to avoid the need for air conditioning along with passive design

strategies using thermal mass and night cooling. Buildings should be orientated and designed to enable the use of renewable energy sources in the future. Lessons should be learnt from past building techniques and from methods used in more extreme climates to alleviate the need for so much energy in our buildings. The problem of ‘fuel poverty’ can be eradicated.

The principles behind highly energy efficient buildings are now well known and they have been routinely delivered elsewhere in Europe. We must also become able to reduce the demand of developments for resources. The sustainable communities programme needs to lead the way to achieve high quality ways of life.⁵⁷

II. Mobility and Communication: Historic Towns and Landscape Exploration

The *Central Balkan Mountain Region* is an attractive natural area surrounded by *Central Balkan National Park*. Bulgaria has three National Parks – Pirin, Rila and Central Balkan. They have a total area of 193,049 hectares and comprise more than one-third of all protected areas in Bulgaria. The National Parks belong to the state. They are public property. They are managed and administered by Directorates, operating under the Ministry of Environment and Waters.

Pirin, Rila and Central Balkan are among the largest and most valuable protected areas in Europe. They contain some of Europe’s remaining, extant, wild regions. Identified as Category II protected areas by the World Conservation Union⁵⁸, the Parks are managed in accordance with the latest conservation principles and approaches. The Management Plans for Rila and Central Balkan are the first modern conservation management documents of their kind in the Balkans.

The Bulgarian National Parks offer excellent opportunities for tourism, scientific research and education. Of special importance to Bulgaria are the wide varieties of renewable resources that provide livelihood and cultural value for people living in close proximity. There are also vital links between sustainable non-timber resource harvesting and economic development opportunities for the country. The National Parks also include rivers, lakes, natural landmarks, waterfalls, and exceptional landscapes.

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The National Parks are among the government’s most important tools for natural resource husbandry of land, water and air resources, as well as wildlife. They are a source of prosperity for the local people, and a source of national social and economic welfare.

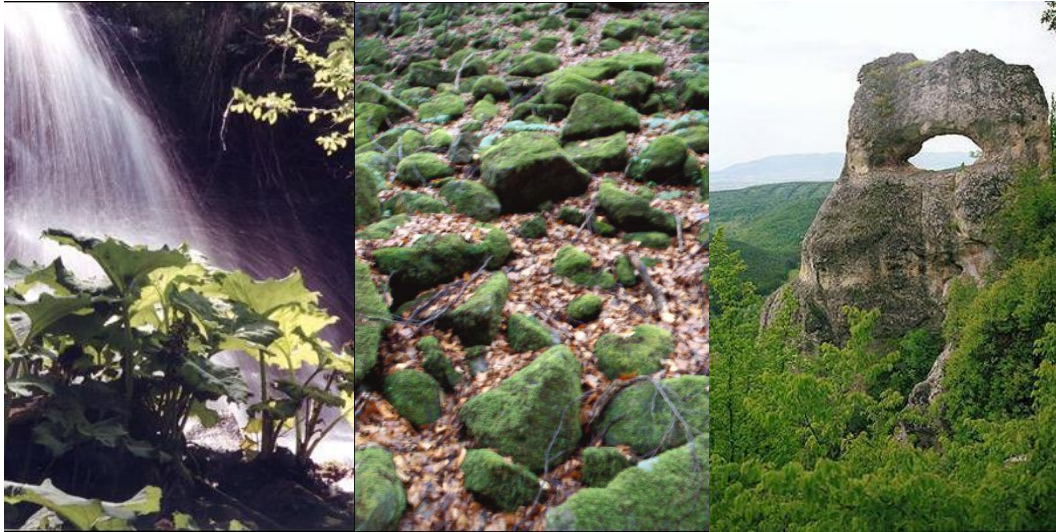
With the existing paths, tracks, and roads, it offers a great opportunity for the incorporation of natural and cultural heritage. The other element relevant to territorial regeneration is the presence of a derelict rail track.



Central Balkan National Park

⁵⁷ Ibidem,

⁵⁸ www.iucn.org



Natural Beauties of the Park

The existence of these combined elements is valuable in allowing the articulation of a green network that connects historic towns with natural, agricultural, and cultural landscapes. These elements can be complemented by special services with high environmental qualities.

III. Environmental and Cultural Network: Natural, Agricultural, and Cultural Landscapes

The integration of natural, agricultural, and cultural landscapes as a strategy has been considered as a key issue of development. Some specific characteristics have been studied in depth:

- natural landscapes as having value in multiple arenas: aesthetic, economic, natural heritage, as an environmental quality indicator, and as a citizens' identity constructor;
- cultural landscapes as a synthesis of cultural and natural heritage, and as reference of social identity; and
- Agricultural landscapes as reserves of economic power.

It is important to combine several conditions in the regeneration of the area: environmental quality strengthening without cultural, social, and economic deterioration; managing natural resources to encourage culture, tourism, and recreational activities; stimulating cultural and natural heritage as a development key as opposed to high impact activities, low quality tourism, or increasing depopulation.

IV. Bioclimatic Architecture: Research and Innovation

The architectural dimension leads to study the bioclimatic solutions for cultural heritage and for new interventions. It is possible to develop activities in the following areas:

- **Bioclimatic architecture:** evaluating buildings' energy conditions and needs; promoting energy saving and integrating renewable energy infrastructures; researching nontoxic and energy-efficient materials, from production to useful life; recycling and reutilizing construction wastes; recovering traditional construction systems.
- **Bioclimatic urban development:** encouraging sustainable urban planning, recovering natural patterns; planning new urban areas; studying geomorphology, vegetation, and sun and water conditions; analyzing climatic needs; designing public space, green areas, streets, and roads; improving the waste cycle; developing new materials and constructive systems.

- **Renewable energy:** focusing on sun, wind, and biomass energy, a pilot project will introduce current results into urban regeneration policies, strategies, and projects, showing a new way of working with bioclimatic architecture and cultural heritage in Dryanovo region.
- **Conservation and regeneration of cultural heritage and urban structure:** avoiding alterations in urban structure; reviewing urban plans; favoring rehabilitation over new construction; elaborating new legal frameworks by focusing on soil, uses, and cultural heritage; protecting specific instances of cultural and natural heritage; recovering old rail tracks as green corridors; introducing green areas at different scales: parks, streets, houses, and terraces.
- **Conservation and protection of natural heritage:** disseminating sustainable uses for natural resources; qualifying young people to create green communal nurseries; developing small-scale ecological product industries; inventorying natural assets that explain the dynamics of ecosystems.
- **Analysis of best practices:** analyzing new productive systems based on sustainable parameters that recognize cultural and natural heritage as support, condition, and power of production processes; designing and applying new systems that promote an equilibrium between the preservation of cultural and natural heritage and the promotion of economic and social benefits; researching ecologically-sound agriculture and bioclimatic architecture that increases quality of life; stimulating initiatives to respect popular architecture, archaeology, history, and traditions; improving communication and shared programs between different administrative departments.
- **Alternative production activities:** promoting agricultural and industrial small-scale activities; encouraging the creation of small enterprises and community organizations; sponsoring workshops focused on sustainability and development.
- **Dissemination:** supporting the commercialization of agricultural products; dispersing bioclimatic architecture; promoting specific seminars.

VII. Land Art and Public Art: Interrelated Dynamics

The region has its traditions in arts and handicrafts with famous school of wood carving and Orthodox icon painting (Tryavna School) including art in urban and regional regeneration is a way to open up new horizons for old citizens and a way to attract new ones. Three steps are fundamental in initiating this strategic line:

- 1) Improve the framework for art expansion, rehabilitating cultural heritage and its urban scene, creating new landmarks, exploring the visualization of urban axes and elements;
- 2) Provide new cultural liaisons and
- 3) Develop artistic activities of different disciplines for diverse social groups.

These measures will deliver impacts at various venues: *art-urban landscape-buildings*, where architecture is the space for art expression; *art-society-economy*, where culture, participation, community, and art are the key issues; and *art-landscape-territory*, where cultural roads facilitate the discovery of art and an unusual connection with the whole area and its emotional power.

- **Urban spaces rehabilitation:** stimulate art, design, and architecture to enrich public spaces and social interaction; design human-scale spaces, respecting local traditions and community identity; use materials and textures sensitive to the urban environment.
- **Land art:** strengthen the relationship between people and the natural environment, encouraging art manifestation in landscapes; alter landscapes with short-term interventions for artistic purposes; rescue local traditions by involving citizens and tourists.
- **Cultural webs (liaisons):** create new public centers with art as a tool to expose community to culture; develop supporting elements in villages, like art hotels, art schools in rural environments, and cultural and conference centers; special events.⁵⁹

⁵⁹ Serageldin, I., "Architecture as an Intellectual Statement", Criticism in Architecture, Ed. R. Powell, Singapore (1989)

IX. Social Dynamics Hubs: Quality of Life, Social Inclusion, and Cultural Heritage

In order to improve the quality of life of the inhabitants of the area, special attention needs to be given to the region's primary problems: an aging population, the pull of the bigger cities that attract young people, and the dearth of opportunities for more vulnerable sectors of this rural society, notably women and young people. Therefore, the efforts in this area were directed at increasing motivation, helping these less well-off sectors of society improve their entrepreneurial capacities, and carving out a future for them in their villages. The goal is to stimulate:

- real opportunities for decent and attractive jobs
- partnerships between local groups and associations with other institutions to improve their communities
- Rural and cultural tourism, with real potential to maintain and promote cultural and natural heritage

These new practices include:

- new economic models for an interactive and flexible cultural heritage management;
- the setting up of Public-Private-Citizen Partnership for greater societal involvement in the preservation of cultural heritage;
- promotion of an integral management of cultural heritage based on its sustainable interaction with its environment;
- promotion of historical knowledge to encourage new and more eco-efficient construction and materials;
- Re-establishment of the preservation of cultural heritage as a priority for city management techniques, with the objective of setting up dynamic urban regeneration and active regional development.

With expected volunteering activities of residents of the Elders House in *Salasuka* that will be mainly of West European cultural backgrounds (UK, Holland, Belgium etc.) the social dynamics will be speeded up and lead to the better quality of management and entrepreneurial potential of local communities.

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An integral part of this model for revitalization is the participation of the inhabitants of the area, the people who will be a key element determining the success or failure of the model's implementation. The participation strategy envisaged would start at the very beginning of the process with an initial social study to involve and engage the community and all the stakeholders involved. Community involvement will be encouraged throughout the process by setting up consultation groups, reference groups, and action groups.

In conclusion we can say that the concepts of sustainable development must be translated to a new situation when dealing with cultural heritage. We are building now the cultural heritage of future generations: consequence-based advanced technologies and practices must be used to keep our cultural heritage alive in the more attractive towns

Types of retirement facilities

As varied as the state licensing and definitions are, so are the types of physical layouts of buildings that provide assisted living services. Assisted living facilities can range in size from a small residential house for three residents up to very large facilities providing services to hundreds of residents. Assisted living, falls somewhere between an independent living community and a skilled nursing facility, in terms of the level of care provided.

Continuing care retirement facilities

Continuing care retirement facilities combine independent living, assisted living, and nursing care in one facility.

People who live in newer assisted living facilities usually have their own private apartment. There is usually no special medical monitoring equipment that you would find in a nursing home, and their nursing staff may not be available at all hours. However, trained staff is usually on-site around the clock to provide other needed services. Household chores are performed: sheets are changed, laundry is done, and food is cooked and served. Some homes even have a beauty parlor on site. Grocery service is often available too. Where provided, private apartments generally are self-contained; i.e., they have their own bedroom and bathroom, and may have a separate living area or small kitchen. Registered Nurses and License Practical Nurses are available by phone or e-mail 24 hours a day, to ensure proper teaching and/or education of staff available.

Alternatively, individual living spaces may resemble a dormitory or hotel room consisting of a private or semi-private sleeping area and a shared bathroom. There are usually common areas for socializing, as well as a central kitchen and dining room for preparing and eating meals.

A typical assisted living facility

Statistically, an assisted living resident needs assistance with an average of three ADLs (activities of daily living like bathing, dressing, eating, and getting around the home or hospital).

A typical assisted living facility resident would usually be a senior citizen man or a woman who does not need the intensive care of a nursing home but prefers more companionship and needs some assistance in day-to-day living. Age groups will vary with every facility.

The Assisted Living Federation of America reports that the average age of assisted living residents is 86.9 years (female average age, 87.3; male average age, 85.7). Female residents (73.6%) outnumber male residents by almost 3 to 1. The majority (76.6%) of assisted living residents is widowed, and just over 12% are still married or have a significant other. The average length of stay for assisted living residents is 28.3 months (the median is 21.0 months).

Residents of assisted living facilities need not be concerned with daily meal preparation, because a central kitchen and dining facility typically provides three meals each day. The central dining facility also allows for visiting with others without having to leave home. This greatly reduces the isolation that elderly, disabled people may suffer when living alone and who are afraid (usually for physical reasons) to leave their homes.

Special needs

The residence may assist in arranging the appropriate medical, health, and dental care services for each resident. The resident generally chooses his or her medical doctor and dental services. Residents who have periods of temporary incapacity due to illness, injury, or recuperation from surgery often are allowed to remain in the residence or to return from a rehabilitation center, skilled nursing facility or hospital if appropriate services can be provided by the assisted living residence. It is important to remember that assisted living residences are a bridge between living at home and living in a nursing home. Assisted living residences do not typically provide the level of continuous skilled nursing care found in nursing homes and hospitals.

More recently built facilities are designed with an emphasis on ease of use by disabled people. Bathrooms and kitchens are designed with wheelchairs and walkers in mind. Hallways and doors are extra-wide to accommodate wheelchairs. These facilities are by necessity fully compliant with the *Americans with Disabilities Act of 1990* (ADA) or similar legislation elsewhere.

The socialization aspects of ALFs are very beneficial to the occupants. Normally the facility has many activities scheduled for the occupants, keeping in mind different disabilities and needs. Many ALFs also serve the needs of the mentally ill community, primarily people with some form of dementia including Alzheimer's disease, but also others as long as they do not present an imminent danger to themselves or others. In the United States, legislation enacted by each state defines not only the level of care, but often what conditions are prohibited from being cared for in such a home.

An adult day care center

Commonly known as adult day services, is a non-residential facility providing activities for elderly and/or handicapped individuals. Most centers operate 10 - 12 hours per day and provide meals, social/recreational outings, and general supervision. Adult daycare centers operate under a social model and/or a health care model.

Daycare centers may focus on providing care only for persons with Alzheimer's and related dementias or their services may be available for any disabled adult. Some daycare centers maintain a nurse on-site. Occasionally, there will be a small room devoted to clients to have vital signs checked, etc. by a medical assistant/nurse when needed. They may also provide transportation and personal care as well as counseling for caretakers.

Participation in adult day care often prevents re-hospitalizations and may delay admission to residential long term care. For participants who would otherwise stay at home alone, the social stimulation and recreational activities may improve or maintain physical and cognitive function. For caregivers, adult day care centers provide respite care, enabling caregivers to work or to have a break from their caregiving responsibilities.

More than 4,600 adult day centers are operating in the United States providing care for 150,000 older Americans each day.⁶⁰ Nearly 78 percent of adult day centers are operated on a nonprofit or public basis. Daily fees for services are almost always less than a home health visit and about half the cost of a skilled nursing facility. Daily fees for adult day services vary depending upon the services provided. Average daily fees across the country are approximately \$56. Funding for adult day services comes from participant fees, third party payers as well as public and philanthropic sources.

⁶⁰ <http://www.nadsa.org>

Long-term care (LTC)

It provides variety of services which help meet both the medical and non-medical need of people with a chronic illness or disability who cannot care for themselves for long periods of time.

It is common for long-term care to provide custodial and non-skilled care, such as assisting with normal daily tasks like dressing, bathing, and using the bathroom. Increasingly, long term care involves providing a level of medical care that requires the expertise of skilled practitioners to address the often multiple chronic conditions associated with older populations. Long-term care can be provided at home, in the community, in assisted living or in nursing homes. Long-term care may be needed by people of any age, even though it is a common need for senior citizens.

The *Centers for Medicare and Medicaid Services* (CMS) estimates that about nine million men and women over the age of 65 in the US will need long-term care in 2006. By 2020, 12 million older Americans will need long-term care. It is anticipated that most will be cared for at home; family and friends are the sole caregivers for 70 percent of the elderly. A study by the U.S. Department of Health and Human Services says that four out of every ten people who reach age 65 will enter a nursing home at some point in their lives.⁶¹ About 10 percent of the people who enter a nursing home will stay there five years or more.

The growing cost of long-term care has stimulated policymakers to develop new approaches to control public expenditures and also has altered market strategies for providing that care. Accurate estimates of use and cost and identification of factors that influence care decisions provide the basis for designing new public policies and new market strategies to meet demand with fewer resources.

AHCPR's (Agency for Health Care Policy and Research) research has documented the high use of care by, and expenditures for, elderly and long-term care populations in general and the significant overlap of long-term and acute care:

- In 1987, per capita health care expenditures (in 1992 dollars) for the elderly living in the community were over \$6,000 compared with \$1,700 for the nonelderly. Per capita expenditures for nursing home residents were about \$29,000 (Cohen, Carlson, and Potter, 1995).
- Nursing home residents are also important users of hospitals. About 9 percent of all Medicare hospital admissions are transfers from nursing homes. About 28 percent had one or more hospital visits during their nursing home stay. (Murtaugh and Freiman, 1995; Freiman and Murtaugh, 1995).

Nursing home costs represent about 70 percent of long-term care expenditures, as well as a large part of AHCPR long-term care research. Studies such as the following document the likelihood of nursing home use, reliance on Government funds, and characteristics of users:

- About 43 percent of persons turning age 65 will use a nursing home before they die. About 20 percent of users will spend 5 or more years there (Kemper and Murtaugh, 1991). Of those turning 65, 17 percent can expect to use a nursing home and receive Medicaid reimbursement (Spillman and Kemper, 1995).
- More than 70 percent of nursing and personal care home residents are women and two-thirds of them are widowed or divorced. About 40 percent are demented and about 59 percent

⁶¹ <http://ahrq.hhs.gov/research/longtrm1.htm>

requiring assistance with four or more Activities of Daily Living (ADLs) (Lair and Lefkowitz, 1990).

- About 10 percent of residents in nursing and personal care homes are under age 65 (Lair, 1992) and 11 percent do not need help with ADLs (Lair and Lefkowitz, 1990).

Other studies estimate the rate of nursing home use by age and functional status, and, for users, expenses per day and source of payment (Feinleib, Cunningham, and Short, 1994; Short, Feinleib, and Cunningham, 1994). Examples of additional studies include a model of hospital discharges to nursing homes (Roberge, Grant No. HS07953), predictors of long stays in nursing homes (Muller, Grant No. HS06672), and a comparison of nursing home admissions in urban and rural areas (Netzer, Grant No. HS000088). Differences in long-term care use and expenditures among African-American, Hispanic, and white populations have also been studied (Pourat, Grant No. HS08034; Proctor, Grant No. HS06406; Wallace, Grant No. HS07672).

AHCPR studies have also contributed to our knowledge of home care use and expenditures, as these examples illustrate:

- Nearly 6 million persons used home health services in 1987 (Altman and Walden, 1993).
- The most frequently used home care services are home health aides and homemakers, providers that frequently are not covered by either public or private insurance (Altman and Walden, 1993).
- Women were twice as likely to use home care as men. Those persons aged 85 and older, widows, those living alone, and those having difficulties with basic daily activities were the most likely to have a home care visit (Altman and Walden, 1993; Short and Leon, 1990).

Generally, home care is provided to a less functionally dependent population, compared with nursing home care, but policies have been designed to try to encourage home care use in lieu of nursing homes, as AHCPR studies have shown:

- Married persons are half as likely as unmarried persons to be admitted to a nursing home; having at least one daughter or sibling reduces those chances by about one-fifth (Freedman, 1996).
- Generous home care programs increase the likelihood that unmarried persons will live independently rather than live in shared housing or enter a nursing or personal care home (Pezzin, Kemper, and Reschovsky, 1996). Evidence was not found that these interventions displaced informal care (Kemper and Pezzin, 1996).

Although there is little evidence that subsidized home care reduces aggregate long-term care costs, one study suggests that if home care services were more tightly targeted to appropriate individuals, the potential for program-level cost savings might be significantly improved (Greene, Lovely, Miller, and Ondrich, 1995).

Studies of the financing of long-term care have analyzed the impact of waiting periods, coinsurance, and deductibles on coverage and the percentage of lifetime cost that is covered (Kemper, Spillman, and Murtaugh, 1991; Short, Kemper, Cornelius, and Walden, 1992). The impact on public costs has also been studied (Short and Kemper, 1994). Another study found that between 12 and 23 percent of persons would be ineligible for private long-term care insurance because of underwriting criteria if everyone applied at age 65 (Murtaugh, Kemper, and Spillman, 1995).⁶²

⁶² Ibidem.

A nursing home, convalescent home, Skilled Nursing Unit (SNU), care home or rest home

These are facilities that provide a type of care of residents: it is a place of residence for people who require constant nursing care and have significant deficiencies with activities of daily living. Residents include the elderly and younger adults with physical or mental disabilities. Residents in a skilled nursing facility may also receive physical, occupational, and other rehabilitative therapies following an accident or illness. Residents may have certain legal rights depending on the location of the facility.

United Kingdom

In 2002 nursing homes became known as care homes with nursing and residential homes became known as care homes

In the United Kingdom care homes and care homes with nursing are regulated by different organizations in England, Scotland, Wales and Northern Ireland. To enter a care home, you need an assessment of needs and of your financial condition from your local council. You may also have an assessment by a nurse, should you require nursing care. The cost of a care home is means tested in England.

As of April 2009 in England, the lower capital limit is £13,500. At this level, all income from pensions, savings, benefits and other sources, except a "personal expenses allowance" (currently £21.90), will go to paying the care home fees. The local council pays the remaining contribution provided the room occupied is not more expensive than the local council's normal rate, currently £364.48 for Hampshire for example. If the resident is paying more than this the council will not pay anything and contributions from a third party or charity must be found or the resident move to a cheaper care home. Between the lower and the upper capital limits, the resident pays their income less personal expenses allowance + £1/week for every £250 capital between lower and higher limit. The council pays the rest, subject to the same conditions as before. It is therefore preferable to find a home within the council's limit if council funding is likely to be required to avoid a forced move later. Patients with capital over more than £23,000 pay the full cost of the care home, until the total value of their assets fall below the threshold⁶³. Patients who require additional nursing care are assessed for this (Hampshire nursing limit 2009 £483pw) and receive additional financial support (£103.80pw) through the *National Health Service* (NHS); this is known as **Funded Nursing Care**. The NHS has full responsibility for funding the whole placement if the resident in a care home with nursing meets the criteria for NHS continuing Health Care. This is identified by a multi-disciplinary assessment process as detailed on the DOH website.

Housing with More Advanced Care:

Continuing Care Retirement Communities (CCRCs). This is a hybrid concept which provides independent living as well as assisted living and nursing care. For example one spouse might need extensive nursing care, but the other can continue to live in her own apartment, even cooking some or all of her own meals. If the other spouse recovers, they can move back to the apartment.

Assisted living: These types of communities typically provide multi-family buildings with services such as meals, housekeeping, medical services, transportation, etc.

⁶³ Compare Care Homes Advice. "'Funding a Care Home' – a comprehensive financial guidance leaflet from: Comparecarehomes.com

Retirement home: Where your grandparents might have lived. Increasingly this is for the very aged, similar to assisted living in ways but not as hard core as a nursing home.

Trends

In the U.S. a few nursing homes are beginning to change the way they are managed and organized to create a more resident-centered environment, so they are more "home-like" and less institutional or "hospital-like." In these homes, units are replaced with a small set of rooms surrounding a common kitchen and living room. The staff giving care is assigned to one of these "households." Residents have far more choices about when they awake, when they eat and what they want to do during the day. They also have access to more companionship such as pets. Many of the facilities utilizing these models refer to such changes as the "Culture Shift" or "Culture Change" occurring in the Long Term Care, or LTC, industry. Sometimes this kind of nursing home is called a "greenhouse."

The 5 Best Places to Retire in Europe

By Susan Beverley / Oct 10

As Europe is such a vast and diverse continent, it's not surprising that it offers so many fantastic options for would-be retirees searching for their perfect place in retirement.

However, for those who herald from further afield such as North America originally for example, getting to know which nations in Europe will offer you the most ideal way of life/cost of living/lifestyle blend can be difficult.

We could suggest you do a European tour for a few months to explore all your options – or we could be a little more helpful than that and reveal to you our choice of the 5 best places to consider for retirement in Europe.

Any list is bound to be wholly subjective of course! However, we have handpicked 5 fantastic countries each offering you something a little bit different – so whether you're after the Mediterranean beach life in Cyprus, the history and lifestyle of Spain, the untouched majesty of Croatia, the fantastically friendly social environment in Ireland or the budget way of life offered in Bulgaria, read on to discover just what Europe could offer you as you research where in the world you would like to live when you come to retire.

Despite the fact that in geographical landmass terms Europe is the second smallest continent, it is home to about fifty nations, states, Principalities, territories and over 700 million people! It has some of the most ancient and fascinating history, it boasts stunning natural landscapes and architectural monuments, the climate ranges from frigidly cold in the extreme north to stunningly warm on the Mediterranean and Black Seas – and there is truly a nation to suit every taste when it comes to selecting your perfect place to retire.

Our top 5 country picks in Europe, each offering you a very different choice of lifestyle for example, are Cyprus, Spain, Ireland, Croatia and Bulgaria...read on to discover why.

Cyprus – a Retirement Haven

Cyprus is a Mediterranean island with a fabulous sun kissed climate. The tourism marketing material boasts that it's an island for all seasons, but it is worth noting that the sun 'only' really shines for 10 months of the year! Cyprus is a destination already exceptionally popular with British retirees – in part this is because Cyprus only taxes them 5% on their pension income, and in part it is because of the amazing lifestyle on offer on the island.

Cyprus manages to bridge the gap between being an affordable tourism destination and a sophisticated, world-class place to live a very realistic life where you can enjoy a very high standard of living.

For example, Cyprus has international schools and hospitals, it has first world health standards and excellent shopping malls, it has great infrastructure including two international airports, decent roads, decent telecommunications links and even a range of employment prospects. All of this means that it is not just one great big retirement home – it is a hip and happening place, ideal for those who want to enjoy their retirement and get out and about and socialise.

The climate is perfect for barbeques and parties, swimming pools and days on the many beaches the island is famous for. The international retirement community is so well established that there are no end of social clubs and events that you can get involved with to enable you to make friends and keep busy. And you can have all of this against a backdrop of amazing mountains, fabulous coastline, and in a location where the world famous Mediterranean diet is served up every day of the year.

You can therefore enjoy a high standard of living in Cyprus, you can be sure your health care needs will be well looked after, you can have a full and varied social life and live in well-built accommodation with options ranging from serviced apartments to golf course or beachfront villas.

Spain – for an Inimitable Lifestyle

If you would love all the benefits Cyprus offers but you prefer a much larger nation to explore, you don't want to be restricted when it comes to travel by living on an island and you want more in the way of history, culture, art and integration, how about living in Spain?

As Spain also boasts a long Mediterranean coastline and a fabulous climate for up to seven months of the year you can still be assured a great place to live...however, Spain does come with a whole host of additional and alternative benefits that you may not find in Cyprus for example.

Spain is vast compared to the compact island of Cyprus – and it borders equally fabulous and fascinating nations such as France, Portugal, Andorra and Gibraltar, thus enabling you to have good travel and adventure options from your new doorstep.

Spain also has a myriad of islands that you can explore to find your perfect home such as the Canary Islands including Tenerife, Lanzarote and Gran Canaria and the Balearic Islands such as Ibiza and Majorca. It also boasts international airports aplenty as well as excellent trans-Europe train links enabling accessibility and travel opportunities.

It's a nation famed for its art and music, and it is so culturally rich that if you want to enjoy old pastimes or take up new hobbies when you retire, you will be spoilt for choice if you move to Spain. You can learn how to do mosaics, you can paint or sculpt like Dali or Picasso, you can learn flamenco or explore hidden Spain's architectural treats such as its castles, monasteries and abbeys.

For sports enthusiasts you can ski in Spain, you can hike and bike, you can swim and play golf. For landscape lovers not only is the Spanish coastline diverse and beautiful with rugged cliffs and dramatic scenery on Northern Spain's coastline, and with pristine beaches in the south, but Spain is home to multiple mountain ranges, plains and valleys meaning that you can explore and enjoy to your heart's content.

The Spanish cuisine is as varied and colourful as the nation's history and art, and the Spanish language is lyrically beautiful and a fascinating challenge to embrace in retirement. All in all Spain boasts so much in its favour that it's worth exploring by anyone looking for more than just a retirement home in the sun!

Croatia – Untouched Splendour

Like Cyprus and Spain, Croatia has a fantastic climate and a wonderful coastline, but unlike both Spain and Cyprus the nation is pristine and untouched, unspoiled and lesser explored. As a result you can forge your own way and establish your very own unique way of life in Croatia.

As Lonely Planet puts it, "Croatia's pleasures are more timeless than trendy" which suits many a retiree looking for a high quality of sustainable living abroad.

From its ancient walled cities to its coastal coves and inlets Croatia sparkles with beauty. And from within Roman ruins in major cities every day life bustles apace. The Croatian people blend their modern lives with the ancient history that is evident all around them, and for a foreign retiree this is fascinating.

Unlike in a country such as Spain where you can of course visit and appreciate the nation's major historical artefacts and architecture, in Croatia history lives and breathes all around you. Film stars' yachts grace the coast with their discreet presence and the elite buy islands along the nation's coastline, but the secrets and delights of Croatia are far less well known than in many nations in Europe, which has kept this perfect country from being oversold and over inundated with foreign influence.

If you want to live in a beautiful and historic nation where on the one hand time has stood still for generations to allow people to enjoy an exceptionally laid back, family centric lifestyle, and where on the other hand the standard of living is high, Croatia could tick many of your boxes as a retirement destination.

Real estate costs in the nation have risen as its popularity has increased, but they remain more competitive compared to the likes of Spain or Cyprus for example.

Ireland – Home from Home

Many North American citizens can trace familial roots right back to Ireland and have visited the island as a result – but if you have yet to experience Ireland and you don't necessarily have any family ties drawing you 'home,' living in Ireland can be a fabulous choice if you want to forge the very strongest social bonds.

Ireland is famed as being a fun place to live, where citizens work hard but play harder, and where central to the way of life is a pub in which good food is served, good music is played, good conversation is enjoyed and good friends are made.

If you want to put down strong roots in retirement, you're not interested in learning a new language or going in search of perpetual sunshine, Ireland could be well worth your consideration.

It offers history and culture, it has high healthcare standards and affordable medical services to boot. It has multiple international air and sea ports, the landscape is diverse and varied from stunning windswept beaches to breathtaking mountain peaks. The people are open, welcoming and genuinely friendly and funny, and the leisure and lifestyle options are exceptional.

Once you find a community where you would like to settle and set up home you will find yourself invited to every event and social occasion, and you'll soon feel less like the local stranger and more a part of the real Ireland.

The economy in Ireland has taken a real battering thanks to the global financial issues many nations have been impacted by – but on a positive front for retirees, this does mean the cost of living and also the cost of buying real estate in Ireland have dropped significantly.

If you're looking for community living in a nation famed for its friendly people and where you can make a fabulous new home for yourself, in a land where you will never be bored or lonely, consider Ireland.

Bulgaria – Bargain Beauty

If you're concerned about the cost of living in retirement – and let's face it, the thought of living on a fixed income makes 'value for money' a high priority in many a retiree's mind, Bulgaria, one of the newest entrants to the European Union, could be the perfect nation for you to explore.

Bulgaria is in Europe, it's in the EU, it's part of NATO, it has a strong emerging and developing economy – but of critical importance is the fact that it does not (yet) use the euro as its currency. This has had the long-term effect of keeping costs and prices so much lower in Bulgaria than in equally interesting nations in Europe, such as most of those listed above for example!

Before Bulgaria joined the ranks of the EU back in 2007 there was much speculation that its real estate and tourism economies would boom. Inward investment by Europe was massive, and speculative investment from private sources soared. However, Bulgaria never really boomed as expected, and instead it has managed to maintain its ethnic integrity and its national identity, and not sell out to become just another tourism centre in Europe.

Bulgaria *does have* a tourism industry however – it has three in fact – one is centred along its fantastic Black Sea coastline in the summer, one is centred in the Bulgarian mountains' ski resorts throughout the winter, and one is located in the historic heart of the nation in cities such as stunning Sofia. So, if you want to live in a country with diverse cultural and geographic attractions, Bulgaria will tick that box for you.

However, because the nation is not overrun with foreign visitors and it has not had its economic heart over taken by western style consumerism the country has managed to be far less affected by the global economic downturn. For retirees the fact that Bulgaria's economy is small but stable means that prices for goods and services are affordable for everyday people.

Real estate is very well priced – if not cheap – especially when you move away from main cities or resorts, and as long as you are prepared to work to learn the local language you will find yourself welcomed in like any local resident.

The way of life in Bulgaria is not fast paced and ‘first world’ – it is traditional and allows the individual to enjoy a very decent standard of sustainable living. It can be exceptionally ideal for retirees looking to slow down and get back to the basics that make real life enjoyable.

If you want to leave the trappings of modern day America behind and live in a beautiful, historic and affordable European location...consider Bulgaria.

In Conclusion

As you can no doubt see, European nations are even more distinctly diverse than the States across America – and this can mean that there is definitely a nation in Europe to suit your tastes in retirement. If you’re not convinced that we have picked the 5 best countries to suit you as an individual however, we will have to refer you right back to the start of this report and suggest that instead, you pack your bags and head out for a grand tour of the entire continent to enable you to find the right place to call your new home.

About the author: Susan Beverley is a writer and editor for Escape From America Magazine and also writes for and maintains Expat Daily News – the expat news blog for EscapeArtist.com. She traveled extensively before becoming an expat herself having found a place to call home in South America where she has lived since 2005. She understands the concerns, needs and difficulties that expats face from first-hand experience and is dedicated to supporting and encouraging anyone who is looking for a new nation to call home.

Design Principles

Introduction

The architecture can contribute in various ways. It can affect the purpose and the function, as well as the symbol and association. For example, if a setting is viewed as an institution, then residents are often seen sick, feeble, or unhealthy. It is very important to design the environment, so it can encourage social interaction, but at the same time assure privacy. The ability to exercise choice allows the older resident to balance these opposing positions. The environment must facilitate flexibility and choice so residents can make decisions based on individual competency and personal need. The physical environment must not create barriers that limit choice, control, independence, and autonomy. Lawton's competency-press theory⁶⁴ suggests that the best match between the environment and the individual is the one that engages abilities rather than passively supports need.

Themes, Principles and Concepts

In the publication by Regnier and Pynoos in 1987 "*Housing the aged: Design Directives and Policy Considerations*", they focused their inquiry around six distinct themes. These themes created a partial list of priority areas that researchers had addressed through their work and formed the basis for a discussion of future research directions.⁶⁵

- 1. Resident Satisfaction:** Studies oriented toward measuring life satisfaction, quality of life, or other attributes of resident preference and desire as they relate to physical design and operational policies of housing for the aged.
- 2. Social Interaction:** Studies oriented toward understanding more about how physical and operational environments stimulate, enhance, protect, and nurture informal and structured social exchange.
- 3. Management:** Studies that identify management as an important influence in creating or quashing activities and behaviors that enhance resident quality of life.
- 4. Sensory Aspects:** Studies that address how the environment can respond to the changing sensory modalities of the older person in ways that compensate for aging losses.
- 5. Physiological Constraints:** Studies that examine grip strength, reach capacity, muscle strength, motility, and ambulation ability in an effort to better understand how the environment can support these losses.
- 6. Wayfinding:** Studies that examine how older residents orient themselves within buildings and also suggest how to design settings to allow residents and visitors to effectively find their way around them.

⁶⁴ "Assisted Living Housing for the Elderly" Victor Regnier, AIA, 1994, p.30 (Lawton and Namehow 1973, Lawton 1980)

⁶⁵ Ibid., p.42

In 1990 Keren Brown Wilson recognizes six *attributes* of the physical and operational environment and identifies four *concepts* that underline her management philosophy for housing the frail elderly. The attributes include:

1. Privacy
2. Dignity
3. Choice
4. Independence
5. Individuality
6. Homelike Surroundings

The following four concepts are accompanied by suggestions about how to implement them through a consistent management philosophy. They include:

1. **Create a Place of One's Own:** Assure privacy through a locked door, a private bathroom, and the ability to prepare food.
2. **Serve the Unique Individual:** Each resident's needs and abilities are different. Recognizing these differences is the basis for an effective personal therapeutic strategy for each resident.
3. **Share Responsibility among Caretaker, Family Members, and Resident:** Creating care partnerships between formal providers and the family gives everyone, including the older person, the option of participating in care management.
4. **Allow Resident Choice and Control:** Simplifying choices can expand the number of decisions residents can make. The more residents can exercise choice, the more control they have over a given situation.

Regnier and Pynoos's Environment-Behavior Principles, paraphrased and adapted from an earlier article (Pynoos and Regnier, 1991), the following twelve design-behavior principles suggest ways in which they can be applied to assisted living environments by describing their salience to the older frail population.⁶⁶

1. PRIVACY

Provide opportunities for a place of seclusion from company or observation where one can be free from unauthorized intrusion.

2. SOCIAL INTERACTION

Provide opportunities for social interaction and exchange.

3. CONTROL/CHOICE/AUTONOMY

Promote opportunities for residents to make choices and to control events that influence outcomes.

4. ORIENTATION/WAYFINDING

Foster a sense of orientation within the environment that reduces confusion and facilitates wayfinding.

5. SAFETY/SECURITY

Provide an environment that ensures each user will sustain no harm, injury, or undue risk.

6. ACCESSIBILITY AND FUNCTIONING

Consider manipulation and accessibility as basic requirements for any functional environment.

⁶⁶ Ibid., p.43

7. STIMULATION/CHALLENGE

Provide a stimulating environment which is safe but challenging.

8. SENSORY ASPECTS

Changes in visual, auditory, and olfactory senses should be accounted for in the environment.

9. FAMILIARITY

Environments that use historical reference and solutions influenced by local tradition provide a sense of the familiar and enhance continuity.

10. AESTHETICS/APPEARANCE

Design environments which appear attractive, provoking, and non-institutional

11. PERSONALIZATION

Provide opportunities to make the environment personal and to mark it as the property of a unique single individual

12. ADAPTABILITY

An adaptable or flexible environment can be made to fit changing personal characteristics.

Innovation and progress will continue to be made with regard to this housing type. It is important that our future attempts to improve assisted living address both issues of form and function. Architecture that is functionally correct only solves half the problem. The true power of architecture lies in its ability to delight, stimulate, and inspire residents, family members, and staff.⁶⁷

Universal design

Universal design is essential in the development of all new senior housing concepts. They provide the basis for “increased accessibility, safety and health for a diverse population.”⁶⁸ It maps well onto the United Nations Principles for Older Persons and goes further, defining more clearly the practices necessary to transform the everyday environment into one that can accommodate those with different needs. It offers seamless solutions that are not stigmatizing, but, instead are mainstream components of our built world. By designing for a diverse population, universal designers integrate usability by everyone into their work on a routine basis. The Seven Principles of Universal Design, developed in 1997,⁶⁹ point the way to the implementation of this approach, and can be adapted to any design situation.

Principle One: Equitable Use – Housing is useable by anyone, and does not disadvantage, stigmatize, or privilege any group of users.

Principle Two: Flexibility in Use – Living environments accommodates not only a wide variety of individual choices, but also adapt to the user’s varying functional abilities.

⁶⁷ Ibid., p.49

⁶⁸ E. Steinfeld, “The Nature of Barriers”, lecture presented in Diversity and Design course, University at Buffalo, State University of New York, USA, 15th April 2008.

⁶⁹ B.R. Connell, M. Jones, R. Mace, J. Mueller, A. Mullick, E. Ostroff, J. Sandford, E. Steinfeld, M. Story and G. Vanderhein, *The Principles of Universal Design: Version 2.0* (Raleigh, NC: The Center for Universal Design, 1997). Funding for this project was provided by the U.S. Department of Education’s National Institute on Disability and Rehabilitation Research (NIDRR).

Principle Three: Simple and Intuitive – All aspects of the domestic environment are easy to understand regardless of the inhabitant’s experience, knowledge, language skills or concentration level.

Principle Four: Perceptible Information – The housing communicates all necessary information effectively to all users regardless of ambient conditions or the user’s varying cognitive or sensory abilities.

Principle Five: Tolerance for error – The design of residences minimizes the hazards and adverse consequences of accidental or unintended actions by all users.

Principle Six: Low Physical Effort – Everyone can use the dwellings efficiently, comfortably and with minimal fatigue.

Principle Seven: Size and Space for Approach and Use – Housing provides appropriate size and space for approach, reach, manipulation and use regardless of the user’s body size, posture or functional abilities.

Universal design is common sense design that is human-centered. It is a set of ideas, principles, and practical solutions to a complex set of issues that directly affect the quality of life not only for older people, but for everyone. More and more people are beginning to understand that universal design can promote conditions in which older people can minimize their dependence and instead flourish as active members of their communities. They are recognizing the enormous potential of this once quiet movement to build a more socially just world by bringing equity and independence into their daily lives.

Case Studies

01 - The Tradition of the Palm Beaches

West Palm Beach, Florida, USA ⁷⁰



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Architect	Perkins Eastman
Client /Operator	The Whiting-Turner Company
Completion	2004
Useable floor area	36,700 m ²
Units / Capacity	144

The Tradition of the Palm Beaches developed a new approach for senior living facilities by expanding an existing long-term care campus into a full care continuum that offers a non-traditional flexible financial model with "pay as you go" options for services and housing. The client's focus on the project was to incorporate specific themes like ageing-in-place, cognitive impairment, community-based programming and methods of service delivery into a care model that would meet the prospective residents' - the population of 85 plus - expectations without an overly institutional or clinical atmosphere. The geriatric services centre offers training, assessment, home health and outpatient services for at-home seniors, with approx. 2,800 m² dedicated to a new network of services benefitting a broader community than i just those residing on the campus.

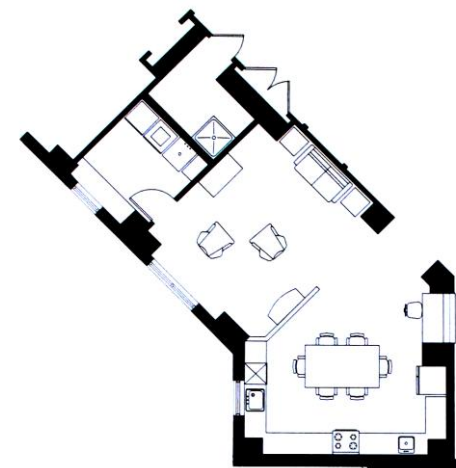
The programmatic solution enhances a campus set on 11 ha, linking a 102-unit independent residential wing to a 42- unit assisted living wing that provides more comprehensive services and shelter for frail residents. While each wing has its own identity, all units incorporate universal design

⁷⁰ "A Design Manual - Living for the Elderly" Eckhart Feddersen, Insa Lüdtkke, Birkhauser, 2009, p.128

principles. Careful zoning of the site and building allows several communities to co-exist amid flexible services.

The overall design concept resulted in a contemporary version of gracious "grand hotel" living in the southern Floridian tradition: stucco arches, terracotta tiled verandas and intimate courtyards give way to interiors that express genteel hospitality and comfortable residential living reminiscent of The Cloister and The Breakers - palatial hotels constructed at the turn of the 20th century during Florida's own Gilded Age. A formal dining room overlooking one of the three man-made lakes is linked to a wellness and activity area, and other recreational amenities.

The Tradition of the Palm Beaches achieved 100% occupancy in 90 days, triggering additional campus expansion. This can be seen as an indication for the success of a model that responds to consumers with flexibility, choice and a gracious style of traditional southern living. The project was mentioned as a Notable Project in the 2006 American Institute of Architects Design for Aging Award and in the same year won a Best of Seniors Housing Award from the National Association of Home Builders 50+ Housing Council as a Continuing Care Retirement Community - Overall Community of a small and midsize category.



Case Study	01 - The Tradition of the Palm Beaches
PRIVACY	Links a 102-unit independent residential wing to a 42- unit assisted living wing
SOCIAL INTERACTION	The client's focus on the project was to incorporate specific themes like ageing-in-place, cognitive impairment, community-based programming and methods of service delivery into a care model that would meet the prospective without an overly institutional or clinical atmosphere.
CONTROL / CHOICE / AUTONOMY	Yes
ORIENTATION / WAY FINDING	Easy (see floor plan)
SAFETY / SECURITY	Careful zoning of the site and building allows several communities to co-exist amid flexible services.
ACCESSIBILITY AND FUNCTIONING	Provided
STIMULATION / CHALLENGE	Careful zoning of the site and building allows several communities to co-exist amid flexible services.
SENSORY ASPECTS	Not specified
FAMILIARITY	"Grand hotel" living in the southern Floridian tradition
AESTHETICS / APPEARANCE	Stucco arches, terracotta tiled verandas and intimate courtyards give way to interiors that express genteel hospitality and comfortable residential living reminiscent of palatial hotels constructed at the turn of the 20th century
PERSONALIZATION	While each wing has its own identity, all units incorporate universal design principles
ADAPTABILITY	Maybe

02 - Santa Rita Geriatric Centre

Ciudadella, Menorca, Spain ⁷¹



Architect	Manuel Ocaña del Valle
Client /Operator	CIME / Conseil Insular de Menorca
Completion	2007
Useable floor area	building 5,990 m ² . external works 6,200 m ²
Units / Capacity	70 residents, 20 day-care users

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In addition to creating a facility that provides residents with the necessary privacy, accessibility, security and independence in the last phase of their lives, a primary concern of the architects was to design a building that does not look like a hospital. Long monotonous corridors in particular were to be avoided. Manuel Ocaña's design is instead characterized by a sense of openness: access and circulation areas are generous and promenades non-prescriptive in their direction, opening up multiple perspectives that stimulate the residents, encouraging them to "discover" their environment. The distinctive form of the building, a loop inscribed in the topography of a filled-in quarry, was developed outwards from a basic core unit: the resident's room. Each room is generously proportioned with light and modern furnishings and two separate means of access. Arranged one behind the other, the rooms are strung like beads in a free-form loop that encloses a large interior garden accessible from each and every room.

The snaking band of rooms sits inside a rectangular plot with an exterior facade made of translucent double-wall polycarbonate sheeting, with additional shading elements depending on orientation. Colored surfaces and plastic paneling emphasize the respective atmospheric effects of the light: blue and green tones for the cool light to the north, yellow for the warmer light on the south and

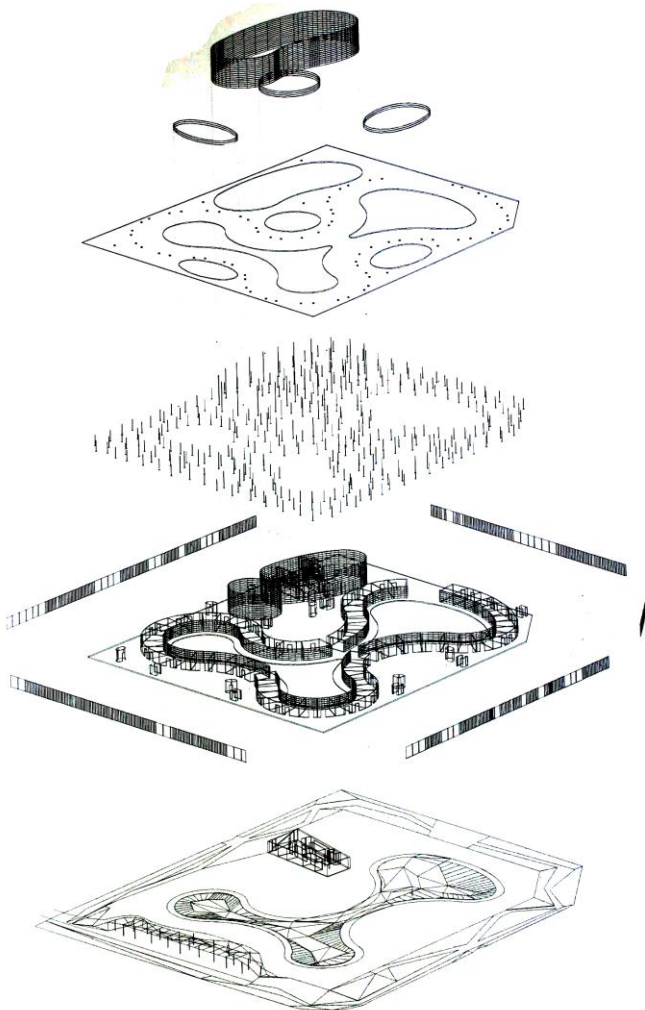
⁷¹ Ibid., p186

west facades. The ceiling consists of a bare slab of reinforced concrete painted with colored lines that pick up the contours of the topography of the former quarry below.

Color highlights are also used to provide additional orientation in each of the three "living loops" and their respective courtyards as well as in the different therapy areas in the geriatric centre: the walling of the freestanding disabled toilets, the lines on the ceilings and even the planting outdoors follow a consistent palette in each of the zones.

The space between the rooms and the outside walls of the building runs around the entire perimeter, varying in width and extending sometimes deep into the interior. It forms a flowing, open and connecting space in which all manner of activities can take place. Rather than having to follow prescribed routes, one can move around the building freely, going from A to B without always following the same path. The atmospheric qualities of this connecting space also change from zone to zone, making moving around an experience that stimulates the senses. The different zones, their changing degree of enclosure and lightness, allow the residents to decide spontaneously which way they would like to go and where they want to rest, according to their mood and physical constitution.

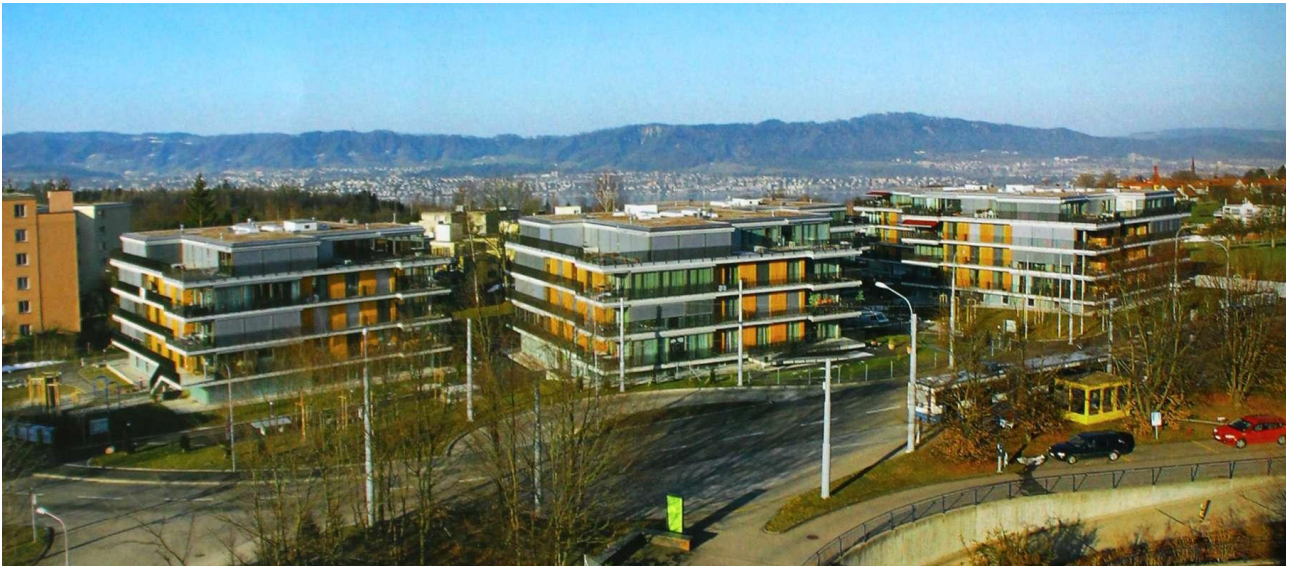
The project was realized on a very tight budget 6000 m² were realized for the price of 4000 m² and priority was given to providing key geriatric facilities and the most essential fittings. Most of the furnishings and finishes, in particular the technical installations, have been left exposed, almost bare. The architects have tried to be as economical as possible with the construction in order to free up remaining funds for supposedly 'pointless' things, citing the Dadaist credo that it is the pointless things which one can least do without in life. The centre opened in 2008 and it remains to be seen whether this comparatively cool and futuristic facility will be embraced by its users in the warm climates of the island of Menorca.



Case Study	02 - Santa Rita Geriatric Centre
PRIVACY	Facility provides residents with the necessary privacy
SOCIAL INTERACTION	All kind of activities can take place
CONTROL / CHOICE / AUTONOMY	Independence - a flowing, open and connecting space which allows various activities to take place. Rather than having to follow prescribed routes, one can move around the building freely, going from A to B without always following the same path.
ORIENTATION / WAY FINDING	Color highlights are also used to provide additional orientation in each of the three "living loops*" and their respective courtyards as well as in the different therapy areas in the geriatric centre: the walling of the freestanding disabled toilets, the lines on the ceilings and even the planting outdoors follow a consistent palette in each of the zones
SAFETY / SECURITY	Provided
ACCESSIBILITY AND FUNCTIONING	Yes. Each room is generously proportioned with light and modern furnishings and two separate means of access. Arranged one behind the other, the rooms are strung like beads in a free-form loop that encloses a large interior garden accessible from each and every room.
STIMULATION / CHALLENGE	Provides multiple perspectives that stimulate the residents, encouraging them to "discover" their environment
SENSORY ASPECTS	The different zones, their changing degree of enclosure and lightness, allow the residents to decide spontaneously which way they would like to go and where they want to rest, according to their mood and physical constitution
FAMILIARITY	Not really
AESTHETICS / APPEARANCE	The primary concern of the architects was to design a building that does not look like a hospital. Manuel Ocaña's design is instead characterized by a sense of openness: access and circulation areas are generous and promenades non-prescriptive in their direction, opening up multiple perspectives that stimulate the residents, encouraging them to "discover" their environment.
PERSONALIZATION	Partially
ADAPTABILITY	Great extent of easily adaptable environment.

03 - Steinacker Residential Complex

Zurich-Witikon, Switzerland ⁷²



Architect	Hasler Schlatter Partner Architekten AG
Client /Operator	ASIC Baugenossenschaft, Wohnung Siedlungsgenossenschaft Zurich
Completion	2004
Useable floor area	8,754 m ²
Units / Capacity	73 apartments, 1 group care apartment, children's nursery with two groups

In the year 2000 the City of Zurich, in its position as landowner, initiated an architectural competition on behalf of a cooperative interested in utilizing the site. The aim was to develop a 1.15 hectare-large site on the edge of the city overlooking Lake Zurich with high-quality housing and external landscaping that takes into account the changing structure of society. Furthermore, maximum use of the site was to be made in order to meet the demands of economic viability of the project.

The winning design proposed five freestanding buildings in the form of modern urban villas. The five-storey buildings with full-height glazing bands are placed on the site in such a way that a multiplicity of views and spatial connections result, both between the buildings as well as between indoors and outdoors. The design of the load-bearing structure with cantilevered floor slabs and balcony balustrading on all sides lends the quadratic buildings a dynamic quality. The buildings appear to float above the terrain, an effect that is heightened further by the cladding of the opaque plinth with fixed double-wall glazing elements.

On a typical floor, four apartments are arranged around a central staircase. The rooms follow the arrangement of the column grid and face outwards with full-height glazed frontages. The bathrooms

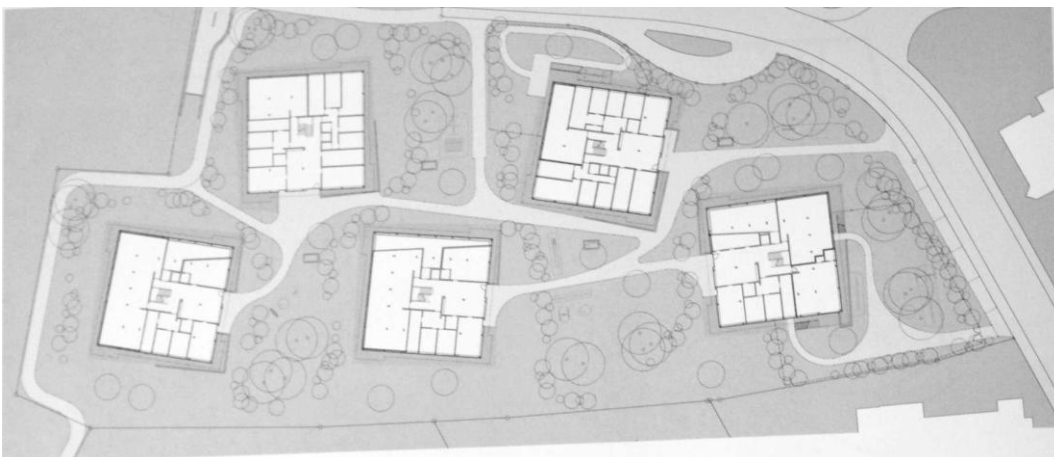
⁷² Ibid., p96

are arranged in a linear fashion around the central staircase. A larger room is located on each corner so that depending on arrangement, each of the 73 three-and-a-half and five-and-a-half-room apartments can be given a different orientation.

The arrangement of the floor plans and the rooms according to the column grid of the load-bearing structure allow the plans to be adapted in various ways to the needs of the individual residents. Depending on the situation, two apartments can also be combined at a later date to form large apartments. The housing complex can therefore cater for an entire life cycle: families with children, couples, singles and the elderly. All flats have barrier-free access without thresholds and the entire route from underground car park to the top storey is suitable for wheelchairs. A lift in each building provides direct access to every floor of the building and the lift buttons are arranged lower than normal so that they can be operated easily from a wheelchair or by children. The entrances, equipped with doors that open electrically and at a width of one meter, are wide enough for wheelchair users or people with wheeled walking aids. Despite these particular facilities, the apartments are not specially designed for the elderly but are simply spacious and light apartments which are designed so that the needs of old people are not excluded. Old people would like to live for as long as possible in their familiar surroundings and the design of the Steinacker housing complex caters for this need. In the rental of the apartments, special attention was given to achieving a mix of generations.

Barrier-free architecture is also beneficial for parents with prams, and each house has a special area for parking prams. One of the buildings contains a children's nursery that caters for two groups and there is plenty of space for playing outdoors. Another of the five buildings houses a residential care group for up to six older people who are in need of ongoing nursing care. Each resident has their own room within the group and there is a large communal room and spacious kitchen, which is used on a day-to-day basis by the residents and the care staff to cook, sing and for handicrafts.

The Steinacker housing complex was awarded the "Age Award 2005" by the Swiss Age Foundation. The Age Award is presented to innovative projects which are then publicized widely. The aim is, through exemplary projects, to stimulate other new projects and developments. The inter-generational concept of "housing for the entire lifecycle", which informs the design of the Steinacker concept, captured the imagination of the jury.



Case Study	03 - Steinacker Residential Complex
PRIVACY	Secured - Each resident has their own room within the group and there is a large communal room and spacious kitchen, which is used on a day-to-day basis by the residents and the care staff to cook, sing and for handicrafts.
SOCIAL INTERACTION	The aim is, through exemplary projects, to stimulate other new projects and developments. The inter-generational concept of "housing for the entire lifecycle", which informs the design of the Steinacker concept
CONTROL / CHOICE / AUTONOMY	The apartments are not specially designed for the elderly but are simply spacious and light apartments which are designed so that the needs of old people are not excluded. Old people would like to live for as long as possible in their familiar surroundings.
ORIENTATION / WAY FINDING	Barrier-free architecture
SAFETY / SECURITY	Secured
ACCESSIBILITY AND FUNCTIONING	Multiplicity of views and spatial connections result, both between the buildings as well as between indoors and outdoors. All flats have barrier-free access without thresholds and the entire route from underground car park to the top storey is suitable for wheelchairs. A lift in each building provides direct access to every floor of the building and the lift buttons are arranged lower than normal so that they can be operated easily from a wheelchair or by children.
STIMULATION / CHALLENGE	Not specified
SENSORY ASPECTS	Concept of five freestanding buildings in the form of modern urban villas
FAMILIARITY	Not really accented.
AESTHETICS / APPEARANCE	The design of the load-bearing structure with cantilevered floor slabs and balcony balustrading on all sides lends the quadratic buildings a dynamic quality. The buildings appear to float above the terrain, an effect that is heightened further by the cladding of the opaque plinth with fixed double-wall glazing elements. In the rental of the apartments, special attention was given to achieving a mix of generations.
PERSONALIZATION	Not specified
ADAPTABILITY	The arrangement of the floor plans and the rooms according to the column grid of the load-bearing structure allow the plans to be adapted in various ways to the needs of the individual residents. The housing complex can therefore cater for an entire life cycle: families with children, couples, singles and the elderly.

04 - RainbowVision

Santa Fe, New Mexico, USA ⁷³



Architect	LLOYD & ASSOCIATES ARCHITECTS
Client /Operator	RainbowVision Properties
Completion	2006
Useable floor area	Commons building (includes assisted living area) 4,188 m ² ; all other independent living units 11,731 m ²
Units / Capacity	26 assisted living 120 independent living units

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RainbowVision Santa Fe is the first retirement village by RainbowVision Properties aimed at gays and lesbians in the United States. Located in Santa Fe, New Mexico, it is in a well-known cultural oasis with a gay-friendly reputation. Communities tailored towards gay seniors have been a dream, gay advocates say, ever since the gay rights movement was born after the 1969 Stonewall riot in New York's Greenwich Village, when a fight between police and drag queens made national news after the police raided a gay bar. In today's world the GLBT community is welcomed into all-inclusive places like RainbowVision. There are several conventional subdivisions that market homes or lots specifically to gays, non-profit urban ventures that include affordable housing and combinations of all popping up throughout the country. "A few groups have acquired land and are moving forward", says the American Society on Aging, including subdivisions in Pecos, New Mexico, Zionville, North Carolina, urban condos and apartments in Boston and Los Angeles, and a lodge with cottages, town houses and nursing units in Santa Rosa, California.

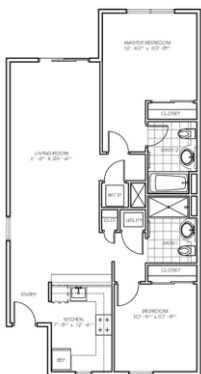
RainbowVision counts 146 condos and rental units on approx. 2 hectares. Residents enjoy dining in the restaurant in El Centro, work out in a fitness centre complete with spa, massage services, yoga

⁷³ Ibid., p150

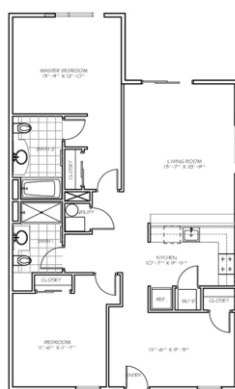
and Pilates classes, physical therapy and acupuncture, or indulge in facials. There are art studios, meeting rooms, a lounge and cabaret. Assisted living apartments on the top floor are an option when residents grow frail but do not want to leave.

RainbowVision has attracted middle- and upper-middle-class gays from across the country. The gay-owned development company is building a second, larger project in Palm Springs, California. The gay senior market is large, but no-one knows exactly how large, given that census forms don't ask about sexual orientation. Gay senior communities do not exclude members of the straight community. Like straights, most gays tell surveys they want to grow old at home, making RainbowVision and other gay projects extremely attractive to many gay retirees. This is significant especially considering that gays have different circumstances such as that almost 90% of gay retirees have no children, and nearly 80% are without partners.

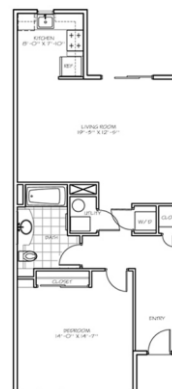
According to SAGE (Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders), a nonprofit group that serves gay seniors in New York City, there are nearly 2.9 million gay men and lesbians over the age of 55.



2 BEDROOM, 2 BATH INDEPENDENT LIVING CONDO / RENTAL UNIT TYPE - C APPROX. NET AREA : 951 SQ. FT.



2 BEDROOM, 2 BATH & DEN INDEPENDENT LIVING - CONDO / RENTAL UNIT TYPE - E APPROX. NET AREA : 1,163 SQ. FT.

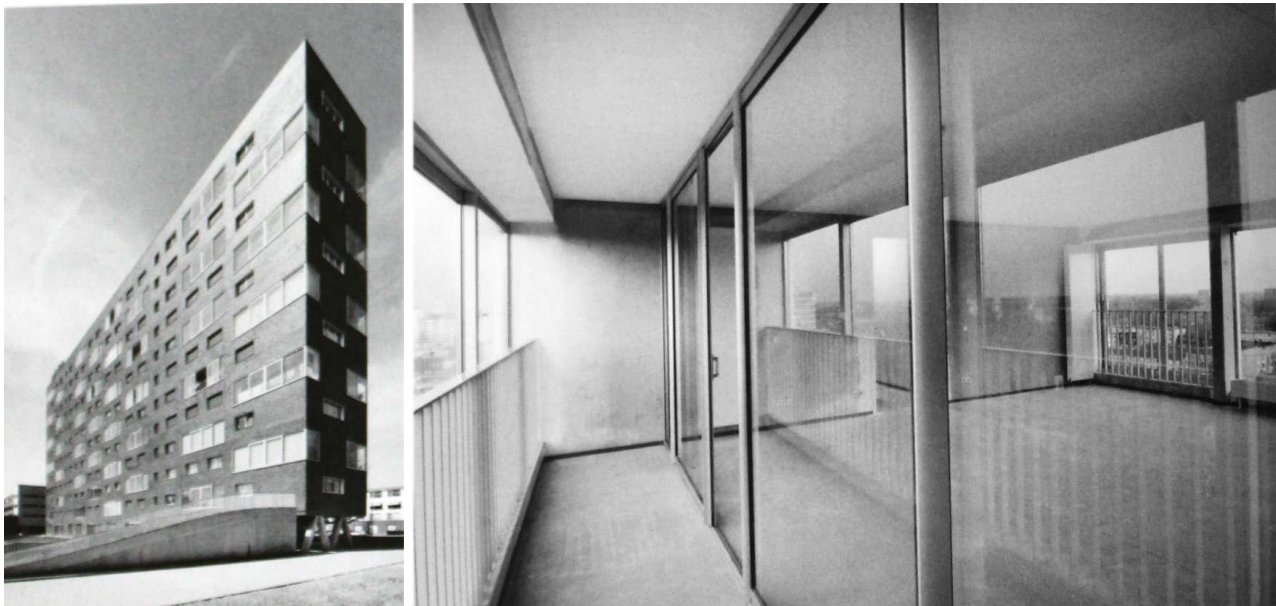


1 BEDROOM, 1 BATH INDEPENDENT LIVING - RENTAL UNIT TYPE - D APPROX. NET AREA : 771 SQ. FT.

Case Study	04 - RainbowVision
PRIVACY	Normal – Rainbow Vision counts 146 condos and rental units on approx. 2 hectares.
SOCIAL INTERACTION	Residents enjoy dining in the restaurant in El Centro, work out in a fitness centre complete with spa, massage services, yoga and Pilates classes, physical therapy and acupuncture, or indulge in facials. There are art studios, meeting rooms, a lounge and cabaret.
CONTROL / CHOICE / AUTONOMY	Exists
ORIENTATION / WAY FINDING	Easy
SAFETY / SECURITY	Not really specified
ACCESSIBILITY AND FUNCTIONING	Exists as seen from the plan
STIMULATION / CHALLENGE	To high degree according to specifics of the group
SENSORY ASPECTS	Not specified
FAMILIARITY	Architectural design is in accordance with high level of aesthetic sense of the group
AESTHETICS / APPEARANCE	Not specified
PERSONALIZATION	Rainbow Vision has attracted middle- and upper-middle-class gays
ADAPTABILITY	High level of adaptability for this specific group. Gays have different circumstances such as that almost 90% of gay retirees have no children, and nearly 80% are without partners.

05 - Palladiumflat

Groningen, Netherlands⁷⁴



Architect	Johannes Kappler Architekten
Client /Operator	Chr. Woningstichting Patrimonium
Completion	2006
Useable floor area	7.890 m ²
Units / Capacity	44 residential units

85

The "Palladiumflat", designed by the German architects Johannes Kappler Architekten, is the first project realized as part of the "De Intense Stad" urban programme in Groningen. Differing slightly from traditional sheltered housing schemes, the building is conceived as residences for people above 50 who previously lived in a detached house, perhaps also in the suburbs, and are looking for a new environment more suited to their needs as they grow older. The design aims to combine the specific qualities of a detached house - privacy, generous outdoor spaces - with multi-storey living in an apartment block. Furthermore, all apartments were to be equally well lit.

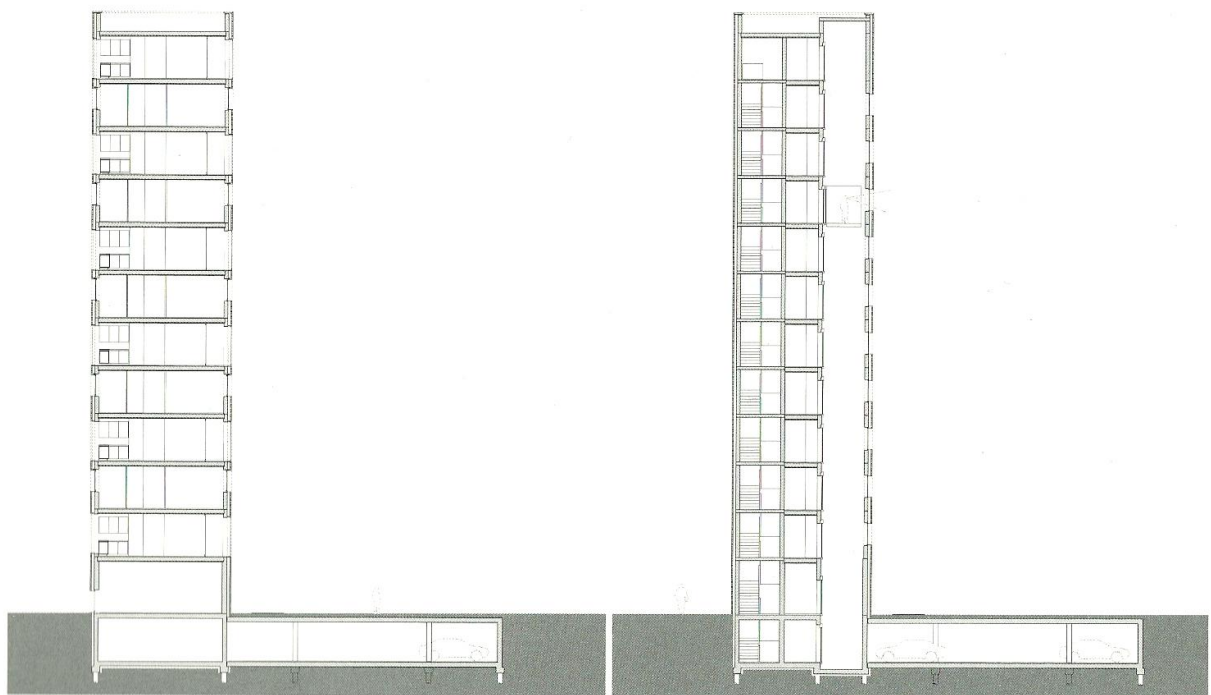
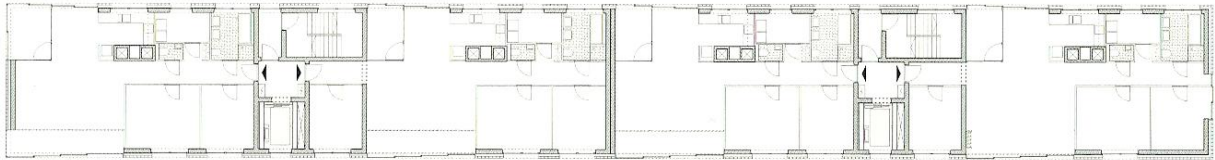
The result is an elegant multi-storey building with two sets of lifts and stairs, each of which serves two flats per floor. With an extremely narrow depth of only 8.70 m, the building provides a variety of different atmospheric qualities - each flat looks over the street to the north and the peaceful communal gardens to the south. Instead of balconies, each flat has a south-facing conservatory that can be closed off and a large glass frontage to the north that can be opened as desired. All flats are designed for accessibility and are adaptable to the needs of residents with impaired mobility.

The arrangement of the floor plan is flipped from floor to floor, which can be seen in the alternating pattern of windows on every second storey on the facade. This makes it possible to incorporate eight different types of flats. None of the flats have internal columns, allowing the floor plan to be

⁷⁴ Ibid., p142

altered at a later date as required and maximizing the use of space and daylight illumination. The building's stability is achieved via load-bearing external walls, which nevertheless feature large windows and even sections with corner glazing.

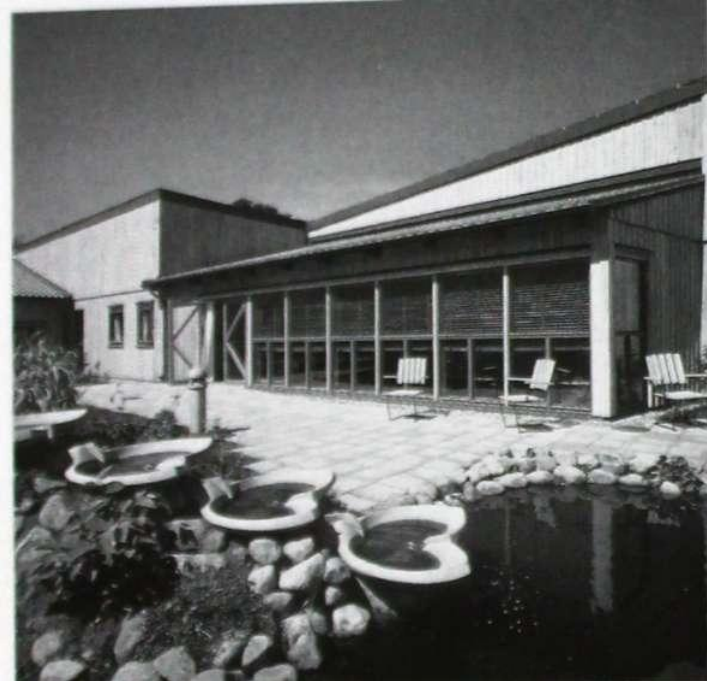
In addition to the two entrance lobbies, the ground floor also contains a community centre for the elderly serving the entire neighborhood as well as the administrative offices of a seniors' organization.



Case Study	05 - Palladiumflat
PRIVACY	High-level. The design aims to combine the specific qualities of a detached house - privacy, generous outdoor spaces - with multi-storey living in an apartment block
SOCIAL INTERACTION	The ground floor contains a community centre for the elderly serving the entire neighborhood as well as the administrative offices of a seniors' organization.
CONTROL / CHOICE / AUTONOMY	Not much choices
ORIENTATION / WAY FINDING	Easy – repeating each other floor plans
SAFETY / SECURITY	Secured
ACCESSIBILITY AND FUNCTIONING	Multi-storey building with two sets of lifts and stairs, each of which serves two flats per floor. All flats are designed for accessibility and are adaptable to the needs of residents with impaired mobility.
STIMULATION / CHALLENGE	City view – not much possibilities for change
SENSORY ASPECTS	None of the flats have internal columns, allowing the floor plan to be altered at a later date as required and maximizing the use of space and daylight illumination
FAMILIARITY	Typical urban building
AESTHETICS / APPEARANCE	The building provides a variety of different atmospheric qualities - each flat looks over the street to the north and the peaceful communal gardens to the south
PERSONALIZATION	May be only in interior of the separate flats
ADAPTABILITY	Good

06 - Vigs Ängar

Köpingebro, Sweden ⁷⁵



Architect	Husberg Architects office AB / Lillemor Husberg Architect SAR/MSA
Client /Operator	Ystad Municipality
Completion	1995
Useable floor area	2.700 m ²
Units / Capacity	32 units and 36 places

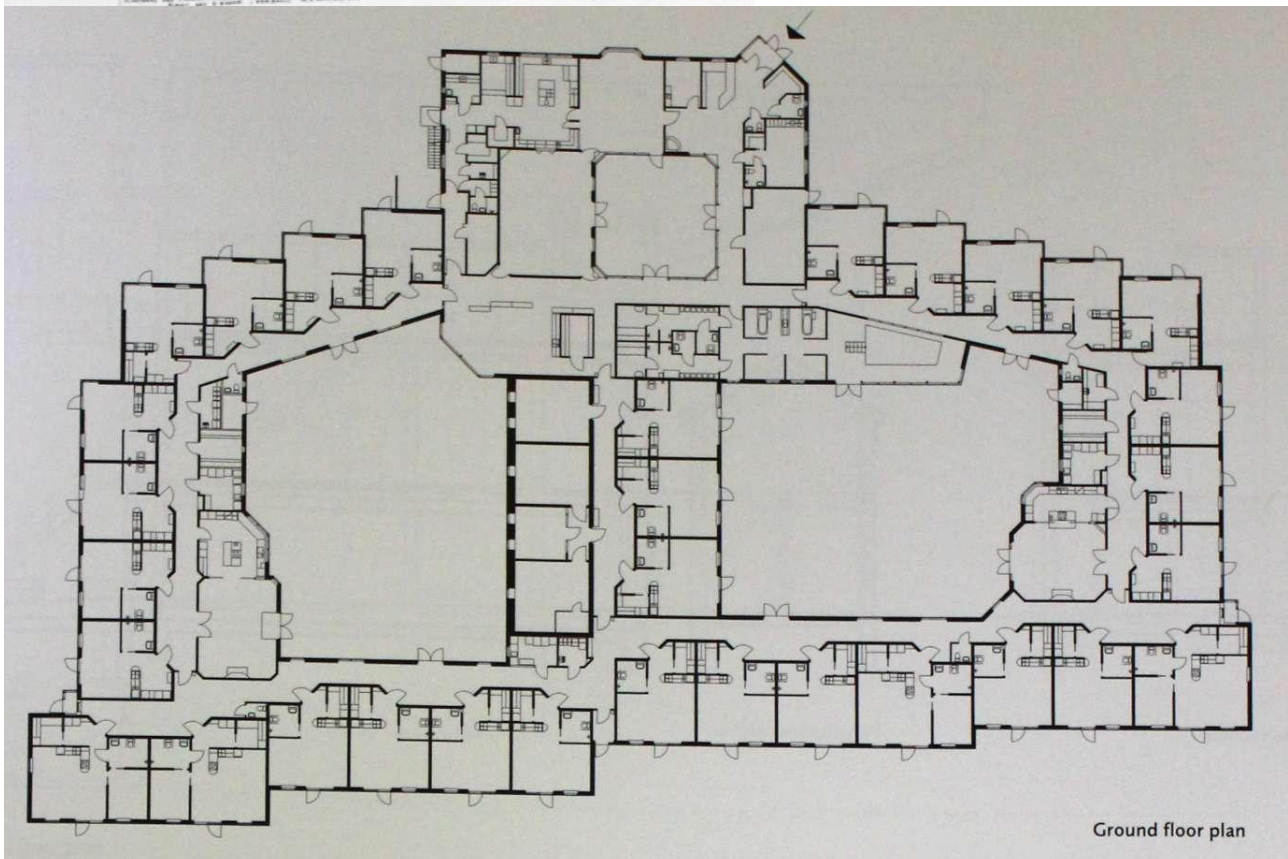
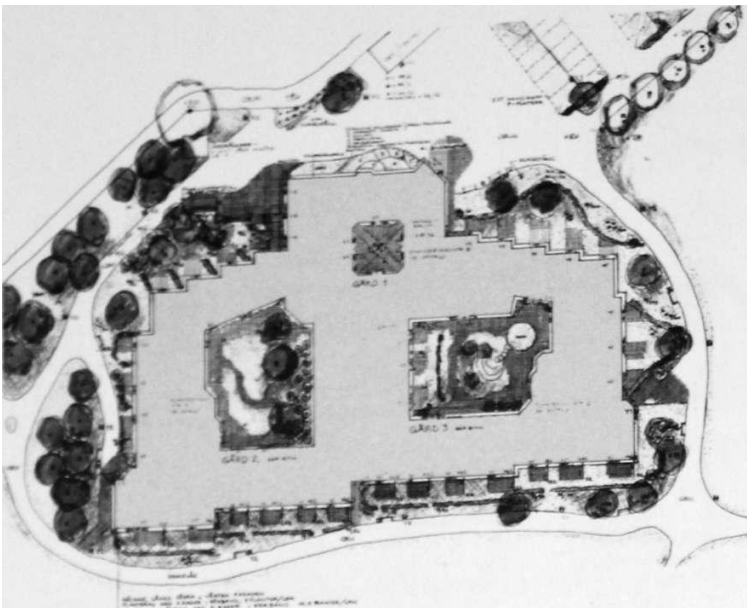
Listed as one of the most interesting social buildings in the world by the United Nations in 2000. the project draws inspiration from the anthroposophical belief that every human being is a unique and constantly developing individual. Of the 32 dwellings, which house up to 36 residents, half were originally intended as serviced flats, the other half as two residential housing units with adjacent communal facilities.

The establishment enjoys an expansive view over the valley of the Nybro River and is arranged on one level around two enclosed courtyards. The flats are like little terraced houses most of which face out onto the countryside. On the inside they are connected by an inner walkway. The dwellings are arranged in three residential groups with sixteen 35 m² flats, twelve 40 m² and four 60 m² flats with two rooms and a kitchen. Today all the flats are residential housing. There are two communal areas with an open fireplace and a farmhouse kitchen as well as an additional lounge. The public areas are arranged around a small courtyard and include a restaurant-cafe and a pool which are also open to non-residents. There is a room for talks and other cultural programs. Generously dimensioned outdoor areas allow easy access for wheelchair-bound persons.

⁷⁵ Ibid., p206

The ecological building concept includes the use of natural materials, paints with natural pigments, energy-saving measures, environmentally-friendly drainage, sewage and water purification plus underfloor heating which extracts heat from ground water via a heat exchanger.

The residents can furnish their flats with their own belongings. A special unit is designed for people with dementia. Here, the lounge serves as an actual living-room because the residents spend most of their waking hours inside the house. The inhabitants are able to live according to their own daily rhythm and do not need to adhere to a common timetable - for example, there is no set time for getting up in the morning. Music, movement and creative activities are as much part of everyday life as warm baths and massages. All meals are made from fresh ingredients using organic and nutritional produce that is free of additives wherever possible. Food is particularly important as its aromas evoke experiences and memories. All residents have their individual contact person among the staff.



Case Study	06 - Vigs Ängar
PRIVACY	Provided
SOCIAL INTERACTION	There are two communal areas with an open fireplace and a farmhouse kitchen as well as an additional lounge. The public areas are arranged around a small courtyard and include a restaurant-cafe and a pool which are also open to non-residents. There is a room for talks and other cultural programs. Generously dimensioned outdoor areas allow easy access for wheelchair-bound persons.
CONTROL / CHOICE / AUTONOMY	Very High. The establishment enjoys an expansive view over the valley of the <i>Nybro River</i> and is arranged on one level around two enclosed courtyards. The flats are like little terraced houses most of which face out onto the countryside. The lounge serves as an actual living-room because the residents spend most of their waking hours inside the house. Music, movement and creative activities are as much part of everyday life as warm baths and massages.
ORIENTATION / WAY FINDING	All residents have their individual contact person among the staff.
SAFETY / SECURITY	Provided
ACCESSIBILITY AND FUNCTIONING	Easy. The flats like little terraced houses most of which face out onto the countryside are connected by an inner walkway.
STIMULATION / CHALLENGE	The residents can furnish their flats with their own belongings. The inhabitants are able to live according to their own daily rhythm and do not need to adhere to a common timetable - for example, there is no set time for getting up in the morning
SENSORY ASPECTS	Not known
FAMILIARITY	The flats are not much different than the typical for the place holiday home or cottage
AESTHETICS / APPEARANCE	The ecological building concept includes the use of natural materials , paints with natural pigments, energy-saving measures, environmentally-friendly drainage, sewage and water purification plus under floor heating which extracts heat from ground water via a heat exchanger.
PERSONALIZATION	Very High level - Incorporated in the very concept of it. The project draws inspiration from the anthroposophical belief that every human being is a unique and constantly developing individual.
ADAPTABILITY	Very High level - of the 32 dwellings, which house up to 36 residents, half were originally intended as serviced flats, the other half as two residential housing units with adjacent communal facilities.

07 - Carmelite Monastery

Bonn-Pützchen, Germany ⁷⁶



91

Architect	Fischer-von Kietzell-Architekten BDA Partnerschaftsgesellschaft
Client /Operator	gwk neubau gmbh
Completion	2000 existing building/2003 new buildings
Useable floor area	6,864 m ²
Units / Capacity	existing building: 31 apartments new building: 16 terraced houses apartment building: 21 apartments

Communal living is the central principle at the heart of the entire scheme for the former Carmelite monastery which is now an inter-generational housing project. This sense of fellowship continues a long-standing tradition of communal living in monasteries as well as in "village communities". The monastery, which dates back to 1706, is surrounded by 6,000 m² of gardens. Together with the neighboring site belonging to the Order of the Sacre Coeur, it constitutes a green "oasis" of almost 15 hectares on a site that has a rich tradition as a pilgrimage destination.

The renovation and conversion of the former Carmelite monastery - a listed building with fully intact cloister - resulted in the creation of 31 privately-owned apartments with floor areas ranging

⁷⁶ Ibid., p86

from 50 to 98 m². In addition, a row of 16 two-and-a-half-storey terraced houses ranging from 134 to 148 m², each with a 30 m² outdoor courtyard, was erected parallel to the monastery's boundary wall. These private areas are supplemented by roof terraces. Embedded between the monastery garden and the boundary wall the clear rectangular forms of the building have a distinctive quality. Both the new houses as well as the monastery are occupied predominantly by childless couples, single-parent families or singles.

The long three-and-a-half-storey building opposite the terraced houses that forms the east edge of the monastery garden is an apartment building with 21 apartments. Most of the apartments are occupied by families with one or two children. The floor plans as well as the sizes of the apartments vary considerably, from 58 to 134 m². The variety of apartment types reflects the fact that young and old people have different living requirements. Maisonette apartments with roof gardens, single-level apartments, multi-storey apartments with a central atrium and apartments for families with their own entrance stair are all integrated into the homogenous form of the building. Individual elements, such as a separate entrance, help residents develop a sense of identification with their own home. An underground garage beneath the monastery garden with 69 parking spaces for the residents keeps the complex almost entirely free of cars.

The single-level apartments in the monastery and in the new buildings are almost all suitable for barrier-free access and all the remaining apartments also cater for the needs of elderly residents. The close proximity to a home for the elderly means that older residents can draw on additional help as required.

The idea and intention of the housing project is based around communal living for young and old. Facilities such as the residents' association, the communal rooms, a guest room and the cafe, as well as the communally maintained gardens, together form a "village community" within the local district of Bonn-Pützchen. They also attract outside interest, stimulating interaction with the local neighborhood and district. These are supplemented by semi-professional recreational activities, arranged by the residents for the community and the neighborhood.

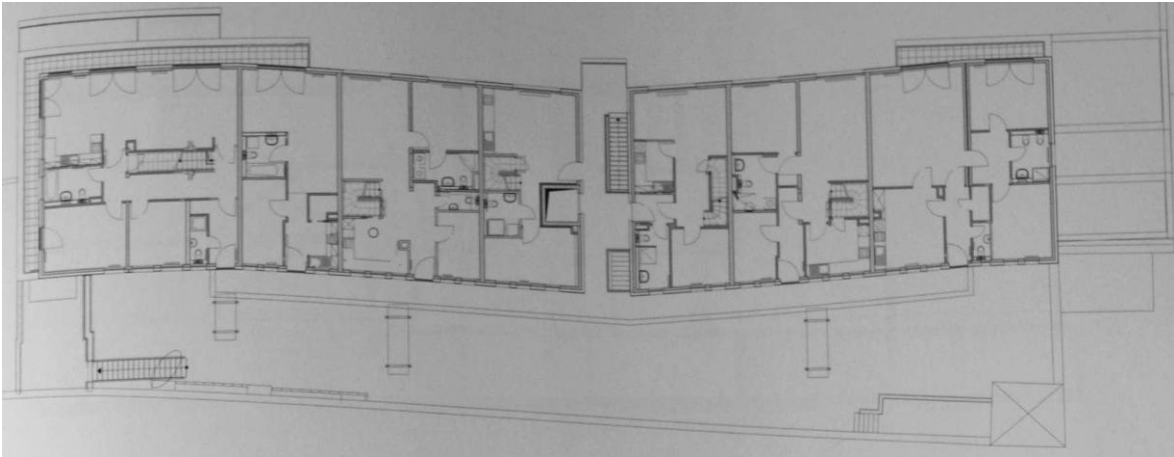
The monastery garden is divided into different areas to cater for the differing needs of the residents and for different activities. The gardens consist of a landscaped park with pond, a playground with play house and open areas around the terraced houses and the apartment building. In addition, the private courtyards and roof terraces, as well as semi-private niches in the transitional area between public and private, offer differing degrees of outdoor usage.

All of the new buildings have been sensitively inserted into the grounds of the monastery, keeping a respectful distance to the monastery itself. Existing views of the monastery and of the park were carefully considered during the planning. The apartment building picks up the building line of the monastery along the street, while the rearward terraced housing lies parallel to the boundary wall of the monastery garden.

Through the provision of a variety of different flat types, sizes and fittings, the complex has attracted residents from different age groups. The integration of different generations has therefore been made possible and is encouraged through the design of the buildings. The successful conversion of the existing building and the compact additions in the gardens form an ensemble of parts that relate to one another in their arrangement and architecture. The complex demonstrates impressively that existing historic building substance can be combined with modern architecture and that old buildings are equally able to accommodate modern living demands.

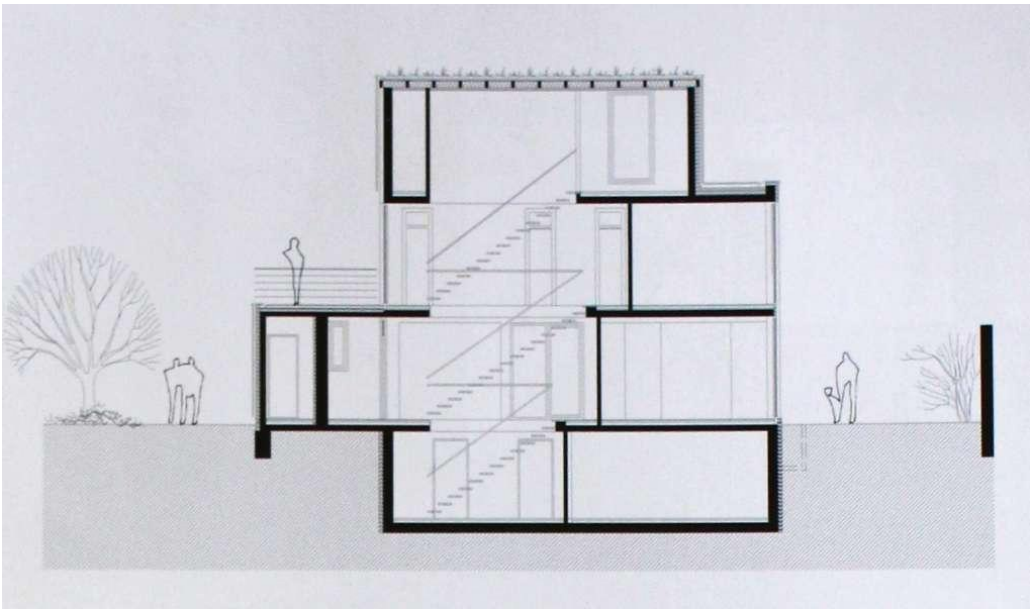


Ground floor plan, apartment building



Roof level plan, apartment building





Section through terraced house



Case Study	07 - Carmelite Monastery
PRIVACY	Ensured. A row of 16 two-and-a-half-storey terraced houses ranging from 134 to 148 m ² , each with a 30 m ² outdoor courtyard, was erected parallel to the monastery's boundary wall. These private areas are supplemented by roof terraces.
SOCIAL INTERACTION	Inter-generational housing project. This sense of fellowship continues a long-standing tradition of communal living in monasteries as well as in "village communities". The housing project is based around communal living for young and old. Facilities such as the residents' association, the communal rooms, a guest room and the cafe, as well as the communally maintained gardens, together form a "village community" within the local district of Bonn-Pützchen. They also attract outside interest, stimulating interaction with the local neighborhood and district. These are supplemented by semi-professional recreational activities, arranged by the residents for the community and the neighborhood. In addition, the private courtyards and roof terraces, as well as semi-private niches in the transitional area between public and private, offer differing degrees of outdoor usage.
CONTROL / CHOICE / AUTONOMY	Separate apartments and gardens allows high degree of control, choice, autonomy
ORIENTATION / WAY FINDING	Easy
SAFETY / SECURITY	Ensured
ACCESSIBILITY AND FUNCTIONING	Excellent. The single-level apartments in the monastery and in the new buildings are almost all suitable for barrier-free access and all the remaining apartments also cater for the needs of elderly residents. The close proximity to a home for the elderly means that older residents can draw on additional help as required.
STIMULATION / CHALLENGE	Embedded between the monastery garden and the boundary wall the clear rectangular forms of the building have a distinctive quality. Both the new houses as well as the monastery are occupied predominantly by childless couples, single-parent families or singles.
SENSORY ASPECTS	The monastery garden is divided into different areas to cater for the differing needs of the residents and for different activities. The gardens consist of a landscaped park with pond, a playground with play house and open areas around the terraced houses and the apartment building. In addition, the private courtyards and roof terraces, as well as semi-private niches in the transitional area between public and private, offer differing degrees of outdoor usage.
FAMILIARITY	Continues a long-standing tradition of communal living in monasteries as well as in "village communities". The monastery, which dates back to 1706, is surrounded by 6,000 m ² of gardens. Together with the neighboring site belonging to the Order of the Sacre Coeur, it constitutes a green "oasis" of almost 15 hectares on a site that has a rich tradition as a pilgrimage destination.
AESTHETICS / APPEARANCE	All of the new buildings have been sensitively inserted into the grounds of the monastery, keeping a respectful distance to the monastery itself. Existing views of the monastery and of the park were carefully considered during the planning. The apartment building picks up the building line of the monastery along the street, while the rearward terraced housing lies parallel to the boundary wall of the monastery garden.
PERSONALIZATION	Individual elements, such as a separate entrance, help residents develop a sense of identification with their own home.
ADAPTABILITY	Powerful - Maisonette apartments with roof gardens, single-level apartments, multi-storey apartments with a central atrium and apartments for families with their own entrance stair are all integrated into the homogenous form of the building. Individual elements, such as a separate entrance, help residents develop a sense of identification with their own home.

08 - The Fran and Ray Stark Villa

San Fernando Valley, California, USA ⁷⁷



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Architect	SmithGroup
Client /Operator	Motion Picture and Television Fund
Completion	2001
Useable floor area	6,420 m ²
Units / Capacity	70 assisted living apartments

The Fran and Ray Stark Villa sits near the east central portion of the Motion Picture and Television Fund (MPTF) Foundations Woodland Hills campus. Founded in 1921, MPTF is a unique affinity group whose members share a professional interest in the entertainment business. Begun by Mary Pickford and Charlie Chaplin as a self-help support service for unemployed actors, MPTF has grown to embrace insurance, wellness, home health services, acute health care, and long-term care as parts of its mission.

The Woodland Hills campus has been a key part of MPTF since before World War II. Presently the campus includes 180 residential units and more than 250 health care beds. The hospital has seven levels of care, from intensive care to long-term and dementia care. Residential space includes 60 cottages, 50 "lodge rooms," and the subject of this evaluation, the 70-unit Fran and Ray Stark Villa assisted living residence.

Woodland Hills sits on the southern edge of the San Fernando Valley, west of Interstate 405 and inland from Malibu and the Pacific Ocean. When MPTF was established, Woodland Hills was a

⁷⁷ Design for Aging Post-Occupancy Evaluations, Margaret Calkins, AIA, John Wiley & Sons, Inc.

small, almost "country" community at the edge of large orchards. Over the next 30 years, the area filled with modest one-story bungalows of wood clapboard siding and cedar-shake roofs. Bougainvillea bursts into color below massive live oaks and cypress climbs into lower reaches of the canyons above Mulholland Drive. Woodland Hills is subject to the same marine layer that shrouds the Los Angeles basin many mornings a year, but its inland location and protective hills generally give it a sunny, dry, and hot climate.

Over the years, MPTF acquired about 80 acres, but has whittled the property down to the 40 acres that form today's campus; only half of the property is actually developed. The land slopes gently but consistently uphill from north to south, making the north end's hospital entry about three floors lower than the Villa entry to the south. Developed as needs became pressing and donations became available, the campus is an informal collection of mostly one-story buildings surrounded by mature, lovingly tended landscaping. The overall effect is relaxed and low-key, in many ways a good match for the bungalows in the surrounding neighborhoods.

By the mid-1990s, MPTF recognized that its existing campus might no longer meet the needs of current residents aging in place or respond to a consumer market in search of non-institutional alternatives. San Francisco architect, the SmithGroup, was retained to produce a campus master plan, which called for:

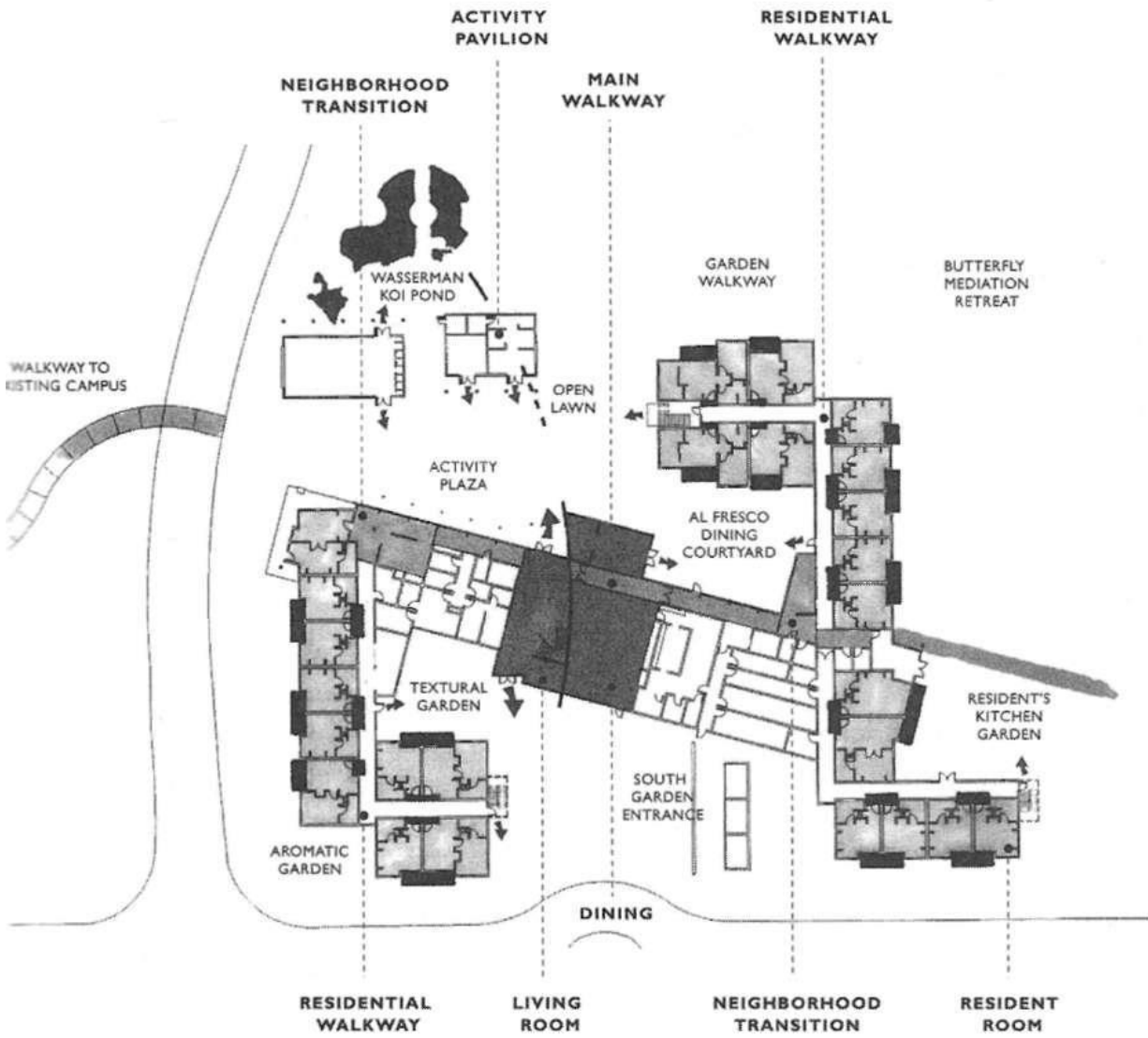
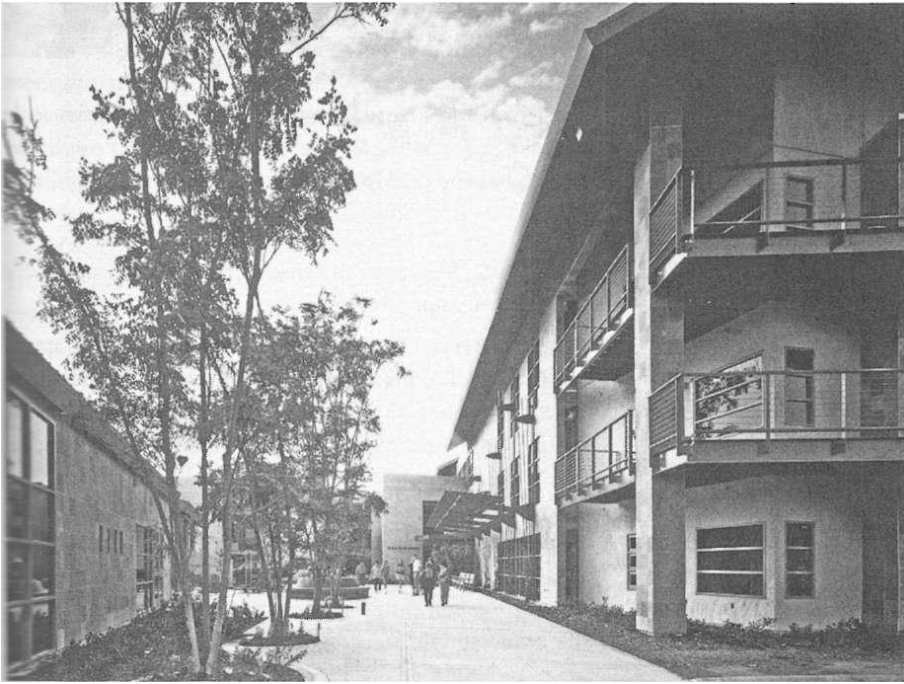
- Phased development of the remaining land in clusters of buildings.
- A new north-south central pedestrian spine with parallel parking and service driveways at the edges.
- A new main-campus entry and center housing administrative and wellness functions.

SmithGroup was also hired to design the first of the new building clusters: an assisted living project. MPTF's intention was to offer older, frailer adults an alternative to the stand-alone cottages—which are better suited to more mobile, younger populations—and the institutional "lodge room" studios created in renovated hospital space.

MPTF built the existing campus through donations, and the assisted living project was no different. Once a major donor was identified during schematics—keeping in mind what had been termed an "8- to 10-year waiting list"—a significant decision was made to maximize the total number of living units within the already established development footprint and budget. The result, completed in October 2001, was a three-story, 63,000-gross-square-foot community with 70 apartment units, of which 70% are studios, 25% are one-bedroom units, and 5% are two-bedroom units.

The Villa is a distinctive piece of architecture that contrasts with both the existing campus environment and mainstream assisted living design. The barrel-vaulted roofs; non-historicized aesthetics; combination of stone, metal, and plaster exterior materials; and profusion of balconies and terraces give the project an unmistakably contemporary feeling. The massing and placement of lower and higher volumes that frame open spaces give the Villa an energy and dynamism that is a significant departure from the existing campus's predominately mid-century modern aesthetic.

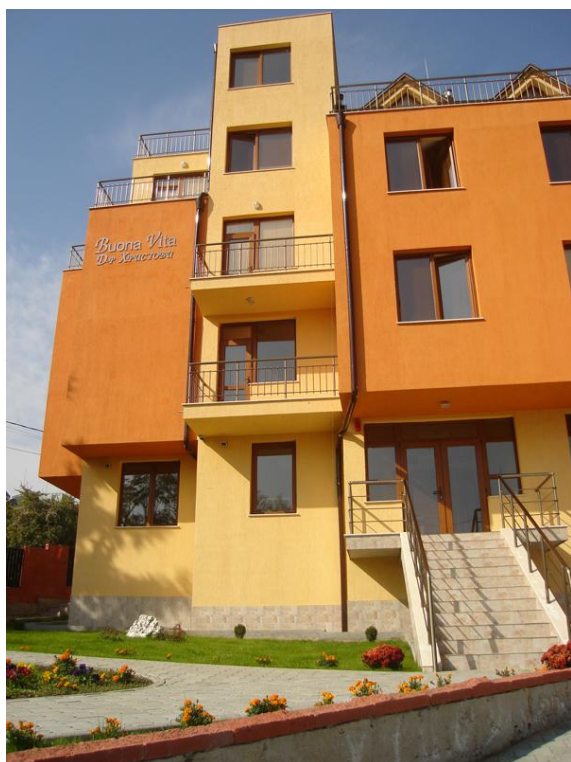
The contemporary design approach continues inside with a double-height entry hall complete with a Hollywood staircase flowing from a second-floor balcony overlooking a portion of the dining room. (See Figure 9 in the color insert.) A second-level outdoor terrace makes the Villa seem almost cut in two by a stone wall that slices through the project from a koi pond on the east toward the shuttle-bus stop on the west. Furnishings have simple lines, accent walls have strong colors, and lighting eschews table lamps in favor of mid-century modern pendants, cove lighting, and wall-washers. Not your grandmother's assisted living residence, one is tempted to observe.



Case Study	08 - The Fran and Ray Stark Villa
PRIVACY	Ensured
SOCIAL INTERACTION	Activity Pavilion is in the centre of facility complex, followed by an open air activity plaza, a lot of gardens including kitchen garden, aromatic garden and garden walkways, dining courtyard, open lawn, living room, etc.
CONTROL / CHOICE / AUTONOMY	Option to choose from variety of activities
ORIENTATION / WAY FINDING	Easy
SAFETY / SECURITY	Ensured
ACCESSIBILITY AND FUNCTIONING	Easy , walkways to separate parts of the complex ensure and to the neighbouring campus
STIMULATION / CHALLENGE	By the mid-1990s, projects for extensions started: 1. Phased development of the remaining land in clusters of buildings. 2. A new north-south central pedestrian spine with parallel parking and service driveways at the edges. 3. A new main-campus entry and center housing administrative and wellness functions. The result, completed in October 2001, was a three-story, 63,000-gross-square-foot community with 70 apartment units, of which 70% are studios, 25% are one-bedroom units, and 5% are two-bedroom units
SENSORY ASPECTS	Extension showed the ability for Changes in visual, auditory, senses for in the environment
FAMILIARITY	Non-historicized aesthetics
AESTHETICS / APPEARANCE	The contemporary design approach. An informal collection of mostly one-story buildings surrounded by mature, lovingly tended landscaping After extension acquire contemporary view. The Villa is a distinctive piece of architecture that contrasts with both the existing campus environment and mainstream assisted living design. The barrel-vaulted roofs; non-historicized aesthetics; combination of stone, metal, and plaster exterior materials; and profusion of balconies and terraces give the project an unmistakably contemporary feeling. The massing and placement of lower and higher volumes that frame open spaces give the Villa an energy and dynamism that is a significant departure from the existing campus's predominately mid-century modern aesthetic.
PERSONALIZATION	Low level
ADAPTABILITY	High level due to the one-storey home-like flats and new extensions' friendly architecture

09 - Buona Vita

Sofia, Bulgaria



Architect	Unknown
Client /Operator	Doctors Hristovi
Completion	2008
Useable floor area	Unknown
Units / Capacity	Unknown

The first private home for the aged Buona Vita (Good life) was opened by the Doctors Hristovi on 9.10.1999 in Knyazhevo, Sofia. It was the first such home, registered under the Social Assistance Law, to obtain a license from the Ministry of Social Policy. Two more homes were opened afterwards – in Bankya and Boyana, Sofia. When Bulgaria became a full member state of the European Union it was necessary to bring in and abide by the European standards and regulations. On 1.9.2008 the new home of the Doctors Hristovi opened doors in Gorna Banya, Sofia. It was built to a well pre-thought architectural plan, meeting all relevant European requirements. The other homes were closed. The new home was created as an alternative to the homes known till then and with the sole humane and noble aim to provide such conditions of life for the aged as receiving cares and services of higher quality, a kind attitude, better living standards, food, consistent with the individual's state of health and no occupancy restrictions.

The two-year experience at a social home in Italy became a valuable experience for Dr. Hristov as he brought the best of care, services and socialization to the occupants of the new home. The aged dwellers benefit from various facilities: rooms with an en-suite shower and toilet, cable TV, a hydraulic elevator for six and a common dining-room. The safety of all occupants is ensured by a

round-the-clock video supervision from the medical room and a fire-alarm system. The garden and park surrounding the building give an opportunity for recreation and walks outside. From time to time concerts and functions are also organized. The constant 24-hour supervision over the aged people, the orderly work organization and especially the immediate reaction in cases of emergency are pluses worth mentioning. The food menu is daily and weekly pre-planned in line with the individual's state of health. When necessary a dietary regime is followed. The occupants are conditionally divided into 3 groups: autonomous (unassisted); people, who move with the assistance of the staff; people in bed (who need to be cared for and served in bed).

Case Study	09 - Buona Vita
PRIVACY	Not ensured – few people in the same room
SOCIAL INTERACTION	The garden and park surrounding the building give an opportunity for recreation and walks outside. From time to time concerts and functions are also organized
CONTROL / CHOICE / AUTONOMY	The occupants are conditionally divided into 3 groups: autonomous (unassisted); people, who move with the assistance of the staff; people in bed (who need to be cared for and served in bed).
ORIENTATION / WAY FINDING	Not known
SAFETY / SECURITY	The safety of all occupants is ensured by a round-the-clock video supervision from the medical room and a fire-alarm system
ACCESSIBILITY AND FUNCTIONING	Not specified
STIMULATION / CHALLENGE	Not existing
SENSORY ASPECTS	N/A
FAMILIARITY	Non- familiarized, standard modern design
AESTHETICS / APPEARANCE	Standard
PERSONALIZATION	N/A
ADAPTABILITY	Medium as far as the building is what we see every day in the city. The owners were investigated for bad treatment of the residents caused even their death.

10 - The Pinewood

Varna, Bulgaria



Architect	Unknown
Client /Operator	Eurolink Investment Group
Completion	Unknown
Useable floor area	Unknown
Units / Capacity	25 units

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One of the major projects of the Group is giving birth to New Varna, which will be built in a peaceful and serene area, only a 10 minutes' drive from the city center of Varna and 20 minutes from Varna International Airport, a few meters from the shores of the Varna Sea Lake and surrounded by a huge virgin forest which is still inhabited by deer and mouflon and decorated by hundreds and thousands of wild flowers and fruit trees. Right on the edge and bordering with the grounds of the project there is a huge pine forest, the trees of which are complimented with the branches of wild vines producing juicy grapes year after year.

Besides the international airport (there are 75 airlines flying to more than 95 destinations in 36 countries), the city has its sea port, which is one of the most modern ports in the Black Sea area, 3 University Hospitals, hundreds of restaurants and supermarkets and with a cost of living which is the cheapest in the EU.

The Pinewood, which will be in the outskirts of New Varna, in a secluded location, on a hill, overlooking the Sea Lake and surrounded by a pine forest. It will be part of a small development by Eurolink Investment Group, consisting of about 25 units, some detached and some semi-detached. There will be planted gardens, communal swimming pools, communal gym and communal medical facilities.

The individual house will be with 2 floors. On the first floor a front garden will be leading to a patio, then through an entrance hall into a very big comfortable living room and dining room in an open-plan fashion, complimented with a fully fitted kitchen. There will also be a guest toilet and

shower room available. An exit door will lead to the back garden. There will be a driving parking for two cars and a storage room at the back of the garden.

The second floor will have a big comfortable landing, 2, 3 or even 4 good-size bedrooms, where one of the bedrooms will be self-contained “toilet & bathroom” with a fitted wardrobe and double-glazed windows. A common bathroom with toilet will compliment the layout of the entire floor.

The house will have a ceramic red-tile roof, while all rooms excluding the kitchen will be carpeted. Naturally all doors and windows will be double-glazed and heating and air-conditioning will be provided in the form of a basic installation of split air-conditioning units with hot and cold air.

Case Study	10 - The Pinewood
PRIVACY	Not specified
SOCIAL INTERACTION	25 units, some detached and some semi-detached. There will be planted gardens, communal swimming pools, communal gym and communal medical facilities. The individual house will be with 2 floors. On the first floor a front garden will be leading to a patio, then through an entrance hall into a very big comfortable living room and dining room in an open-plan fashion, complimented with a fully fitted kitchen
CONTROL / CHOICE / AUTONOMY	N/A
ORIENTATION / WAY FINDING	N/A
SAFETY / SECURITY	Communal medical facilities
ACCESSIBILITY AND FUNCTIONING	Easy
STIMULATION / CHALLENGE	Not known. Yet there are some important intensives for the future residents such as 3 University Hospitals, hundreds of restaurants and supermarkets and with a cost of living which is the cheapest in the EU.
SENSORY ASPECTS	Located in few meters from the shores of the Varna Sea Lake and surrounded by a huge virgin forest which is still inhabited by deer and mouflon and decorated by hundreds and thousands of wild flowers and fruit trees. Right on the edge and bordering with the grounds of the project there is a huge pine forest, the trees of which are complimented with the branches of wild vines producing juicy grapes year after year.
FAMILIARITY	Not-familiarized contemporary buildings typical for sea resorts with some Mediterranean flavour
AESTHETICS / APPEARANCE	Standard
PERSONALIZATION	Not known
ADAPTABILITY	The surrounding area is very suitable for easy adaptation because of sense to be in a long term vacation at the sea shore

Common and Particular

What is the common and particular in the discussed case studies?

The second case study is planned in a way that meets literally all the main **12 principles**⁷⁸ of Reigner and Pynoos. This is achieved, not only by the original architectural design, but also by the functional and social link with the purpose of the complex. With its futuristic design, it is a wonderful example of creative success in the architectural design of these types of buildings.

The third case study promotes so called **Inter-generational concept** of housing for the entire lifecycle and despite of having particular facilities for need of elderly, the apartments are not specially designed for the elderly, but are simply spacious and light apartments which are designed so that the needs of old people are not excluded. Old people would like to live for as long as possible in their familiar surroundings and the design of the **Steinacker** housing complex caters for this need. In the rental of the apartments, special attention was given to achieving a mix of generations. The housing complex can therefore cater for an entire life cycle: families with children, couples, singles and the elderly. This is an innovative concept that deserves to be followed up and further to be implemented because it gives priority to building facilities for continuation of life, not for dramatical change and discontinuity while living in a specifically elders' houses, that do not provide integrity between generations.

Within these lines is also the **7th case study** that presents to us an inter-generational housing project. This sense of fellowship continues a long-standing tradition of communal living in monasteries as well as in "village communities". Most of the apartments are occupied by families with one or two children. The floor plans as well as the sizes of the apartments vary considerably, from 58 to 134 m². The variety of apartment types reflects the fact that young and old people have different living requirements. Maisonette apartments with roof gardens, single-level apartments, multi-storey apartments with a central atrium and apartments for families with their own entrance stair are all integrated into the homogenous form of the building. Individual elements, such as a separate entrance, help residents develop a sense of identification with their own home. In addition, the private courtyards and roof terraces, as well as semi-private niches in the transitional area between public and private, offer differing degrees of outdoor usage. Through the provision of a variety of different flat types, sizes and fittings, the complex has attracted residents from different age groups. **The integration of different generations** has therefore been made possible and **is encouraged through the design of the buildings**. The successful conversion of the existing building and the compact additions in the gardens form an ensemble of parts that relate to one another in their arrangement and architecture. The complex demonstrates impressively that **existing historic building substance can be combined with modern architecture** and that old buildings are equally able to accommodate modern living demands.

To great extend innovative is the **Case study 4**, as it is designed for **specific groups** of gays and lesbians that have not always been included, but mostly have been excluded from the societies they live. We may conclude however, that regarding the architectural design, there are no specific features needed for this type of elder's homes or complexes. In other words, they are designed in accordance with universal principles in architecture. Although the statement is made that in the facility under consideration gays and lesbians accept "straight ones", it is not a big expectations that they will prefer to live in such a culturally different environment and will not prefer to be in a facility that are not inhabited by usual Rainbow associated groups. The other specific in this case study is that it is for mid-and upper class peoples, i.e. not affordable for the lower social groups. Yet according to SAGE (Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders), a

⁷⁸ "Assisted Living Housing for the Elderly" Victor Reigner, AIA, 1994, p.43 (Lawton and Namehow 1973, Lawton 1980)

nonprofit group that serves gay seniors in New York City, there are nearly 2.9 million gay men and lesbians over the age of 55 only in this city.

The 6th case study presents the project that draws inspiration from the anthropomorphically belief that every human being is a unique and constantly developing individual. The main future is high level of personalization, broad scale social activities and freedom to participate to social interaction at your choice without restrictions.

The Case study 8 (MPTF) shows the growth of a **multifunctional facility** aiming to embrace insurance, wellness, home health services, acute health care, and long-term care as parts of its mission. Briefly, to get “all in one” – independent, assisted living, long-term care etc.

Case Studies Comparative Table:

	CS_1	CS_2	CS_3	CS_4	CS_5	CS_6	CS_7	CS_8	CS_9	CS_10
P_1	high	medium	medium	high	medium	medium	medium	medium	low	unknown
P_2	high	medium	medium	medium	medium	medium	medium	medium	high	medium
P_3	medium	medium	medium	medium	low	medium	medium	medium	high	unknown
P_4	medium	medium	medium	medium	medium	medium	medium	medium	unknown	unknown
P_5	medium	medium	medium	unknown	medium	medium	medium	medium	high	high
P_6	medium	medium	medium	medium	medium	medium	medium	medium	unknown	high
P_7	medium	medium	unknown	medium	high	medium	medium	medium	unknown	unknown
P_8	unknown	high	medium	unknown	medium	unknown	medium	medium	unknown	medium
P_9	medium	medium	high	medium	medium	high	medium	high	high	high
P_10	medium	medium	medium	unknown	medium	medium	medium	medium	high	high
P_11	medium	high	unknown	medium	high	medium	medium	low	unknown	unknown
P_12	high	medium	medium	medium	high	medium	medium	medium	high	medium

Legend:

unknown	low	medium	high
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The practice of building homes and facilities for elderly people in the world presents us with an exceptional variety of solutions in the field of the architectural design, although in this context it is somewhat a function of the specific needs of elders and in the same time a subject to certain universal principles. The studied examples (case studies) not only illustrate this great diversity of architectural solutions, but also to explore the various approaches, preferred by leading architects that in one way or another are consistent with the basic principles of this type of more specific architecture.

In general, most of the discussed above cases in countries belong to so the called "Western hemisphere", where the long tradition both in legislation and architectural practice exists, the elder’s homes are built as complexes, rarely as an individual buildings. While in countries like Bulgaria,

where this sector is still in its infancy of development, and because of the specifics of the investors' potential, which is generally low, more common are cases of individual buildings, rarely designed to meet the specific functionality and the purpose of such construction.

Elderly homes with different location – those located in urban and rural areas or in resorts, present different types of design. We can conclude that the former are part of the urban landscape and, therefore, they are subjected to requirements, standards and laws of urban construction and planning. Therefore, they have a low degree of applicability of some principles such as that of personalization, for instance. In the rural or resort areas the greater freedom in architectural design is observed (of course, yet depending on the building plot, investor's potential etc.). Generally, the way of life in them bears the characteristics of more relaxed rhythm that is typical for rural areas. That is why the environment and landscape are particularly important components in the aesthetics of these complexes.

The comparative analysis of individual case studies based on Regnier and Pynoos's Environment-Behavior Principles for the architectural design of such objects, summarized in Comparative Table below, shows that not always the main types of old people's homes are distinguished, on the contrary, often in such a complex were collected different types, such as the Case study 8 (MPTF) and The Case study 9. At the same time as a result of the modern social thought and policy of inclusion of the "different", there are separate homes, designed for specific groups such as gays and lesbians (Case study 4). Their architectural design however is based on the general and universal principles, as the needs of these groups do not differ from the others. Their existence is determined more by their need to be among "their own", thus avoiding disparaging or exclusionary terms of the majority society.

Recently, the architectural design is determined by the more general concept of building homes for the elderly. Especially important and innovative is the Inter-generational concept (Case study 3), which determines the development of specific sites and environments for any generation. This is particularly important for the possibility of continuity of the previous way of life, rather than abrupt change, which without any doubt can cause stress in the initial adaptation. Therefore, some attach greater importance of things, that use historical reference and solutions influenced by local tradition, providing a sense of familiarity and enhances the continuity, in this way bringing up the principle of FAMILIARITY. Others placed in the center of attention problems such as that of social activities and relationships in these homes, giving priority to construction of places of social interaction and general activities. While all without exception comply with such principles as that of accessibility, variety of spaces and rooms or even separate buildings ensuring the social interaction of the residents, privacy of each of them, not all examples other principles are deployed at the same level - is not always possible to Promote opportunities for residents to make choices and to control events that influence outcomes or the principle of CONTROL / CHOICE / AUTONOMY. With varying levels of success the principle of aesthetics is realized (Design environments which appear attractive, provoking, and non-institutional), sometimes due to the height of the buildings, their location in a highly urbanized environment of the city or any other reason. Not all rely on the principle of FAMILIARITY, for example, some of them strive to modernity and the modern materials used in the interior. Not all can provide the applicability of the principle of PERSONALIZATION. Despite numerous papers relating to necessity of placing signs for orientation, it seems not all is done, so there is still much to be desired in terms of the principle ORIENTATION / WAYFINDING. Changes in visual, auditory, and olfactory senses should be accounted for in the environment or the principle of SENSORY ASPECTS is not always applied. The same can be said for the principle of STIMULATION / CHALLENGE, not anywhere is possible the creation of a stimulating environment which is safe but challenging.

All this shows us that worldwide the architecture in this field yet has to evolve. Any architect can give his unique contribution to a certain project, using the concepts, theoretical developments and design solutions of his predecessors.

Part II

The Project

Location and area info

The project will be situated in the village of Salusuka, part of the Dryanovo Municipality. The distance between them is 6 km.

The town of **Dryanovo** is situated at the northern foot of the *Balkan Mountains* in *Gabrovo* Province, Bulgaria, amphitheatrically along the two banks of *Dryanovo River*, a tributary to the *Yantra River*. The town is a centre of the homonymous *Dryanovo* Municipality, which is composed of 62 villages, hamlets and huts picturesquely spread out of the mountain folds. The population of the town as of December 2009 is 8,043.

Dryanovo has a favorable geographical position, being situated 20 km away from *Gabrovo*, 24 km from *Veliko Tarnovo*, 17 km from *Tryavna* and about 30 km away from *Sevlievo*. The town lies on the Rouse-Veliko Tarnovo-Gabrovo-Shipka-Kazanlak-Stara Zagora highway and it is a station of the main railway thoroughfare, which links the north and the south part of Bulgaria.

The national road network is allocated as follows:

- Road I-5 V.Tarnovo – Gabrovo- part of main road E - 85
- Road II – 44 Sevlievo – Gabrovo – connection to main road E – 772 Sofia – Varna
- Road III – 552 Tryavna – Gabrovo
- Road III – 1052 Gabrovo – Uzana area

The **European railway line** CE 95 passes through *Dryanovo* and *Tryavna*. There is a deviation from *Tsareva Livada* to *Gabrovo*.

Distance to the airports in Bulgaria:

Gorna Oryahovitsa – 60 km;

Sofia – 220 km;

Varna – 274 km;

Bourgas – 234 km;

Plovdiv – 150 km;



Map of the main roads crossing Bulgaria

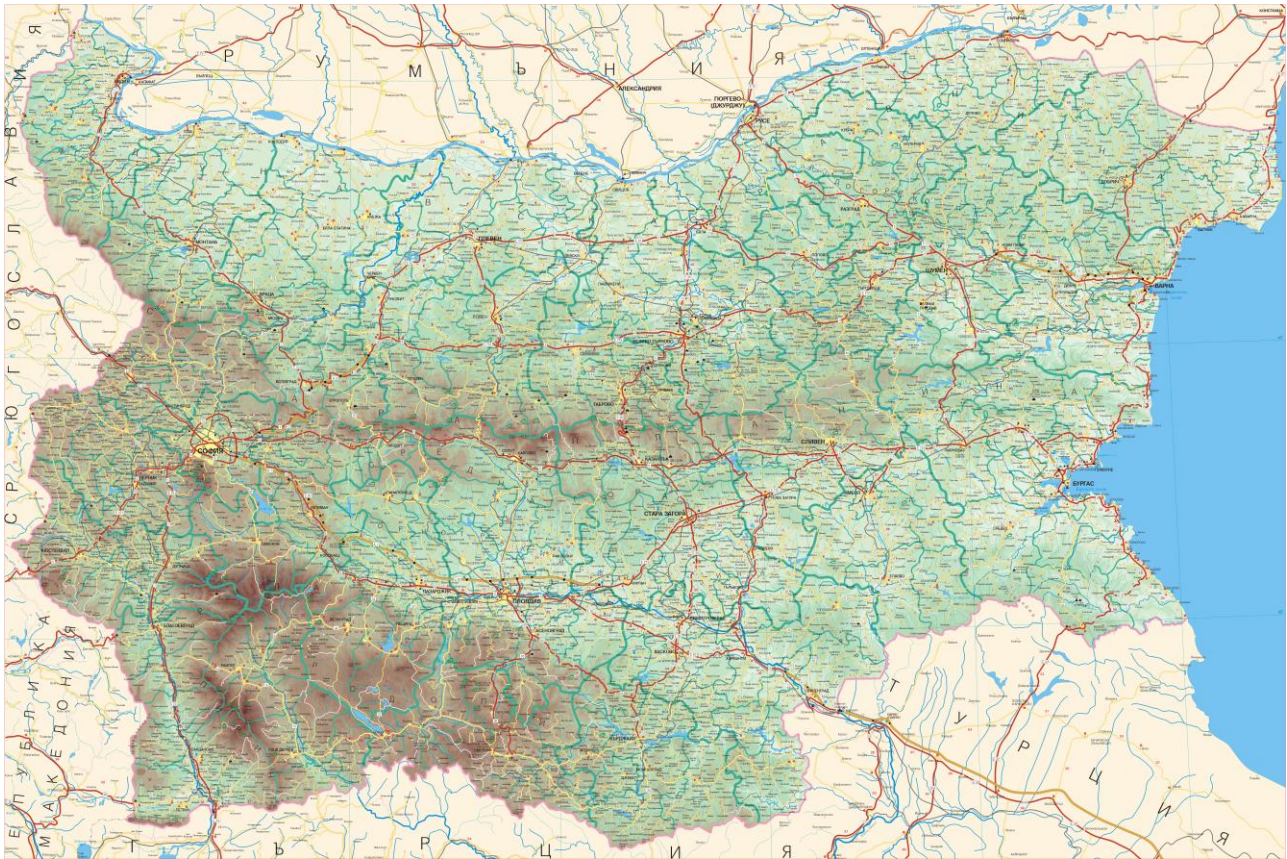
The municipality of *Gabrovo* also has a small airfield in the village of *Mezhdene* which has concrete covering and allows gear landing. At this stage, the airfield is not included in the official aviation network of the country.

The nearest river port of *Svishtov* is 130 km. away.
 The nearest seaport of *Bourgas* is 234 km. away.

Distance to important destinations in Bulgaria:

Dryanovo city is really very close to what we call “geographical center” of Bulgaria (which is *Uzana* resort, best for winter sports). Below are distances to the main Bulgarian cities and ports:

- Sofia- 220 km.
- Bourgas- 241 km.
- Varna- 279 km.
- Rousse- 152 km.
- Gorna Oriahovitsa Airport - 60 km.
- ‘Kapitan Andreevo’ Check Point, Turkish border - 219 km.
- ‘Kulata’ Check Point, Greek border - 404 km.
- ‘Kalotina’ Check Point, Yugoslav border - 278 km.



There is a big municipality hospital in *Dryanovo*. There are also hospitals in *Veliko Tarnovo* and *Gabrovo* which are easily accessible as they are only 20 km from the town. The industry is presented by the biggest on the Balkans Rail Road Wagons Repair Factory. Yet at the present time the efforts of the municipalities are mostly focused on the development of the tourist sector due to the rich historical and cultural heritage of the region: like all Balkan mountain settlements, *Dryanovo* reached its bloom at the time of the Bulgarian National Revival. In 1883 it was proclaimed a town. Masons and woodcarvers spread the fame of the town throughout Bulgaria and far away in the Ottoman Empire. The oldest traces of life on Balkan Peninsula were discovered in the area, proofs of human presence from the Paleolithic were discovered in *Bacho Kiro* cave near *Dryanovo monastery*, situated in the *Andaka* river valley. Numerous relics of ancient villages, fortresses, pillars with inscriptions and ornaments from Thracian and Roman times (*Boruna* and *Diskoduratera* fortresses) were discovered there. The net of Orthodox monasteries are scattered in the region of *Dryanovo*, too.⁷⁹

⁷⁹ http://www.bulgariamonasteries.com/karta_manastiri.html

Project significance

The problem of building homes for the elderly, previously analyzed in the context of global demographic trends and specific practices consistent with the latest technological achievements, but also with modern requirements for quality of life is particularly significant for each group of aging people. With the ever-growing desire to change not only the way of life, but also the place of living, there is a trend of developing such projects in countries with a warmer climate, more sunny days and lower living costs.

This applies completely for the project, which aims to become exemplary for future developments in the country.

The home for Elderly People located in Salasuka village, Central Bulgaria, is **real project, by an investor's task with strict parameters**. The architectural aim is the strive to harmonize the investor's requirements with the best world practices and thus achieving the goal of fully meeting the new, higher standards and principles, described in the previous Chapters, while tailoring the building to the specific climatic and area conditions. Fortunately, they not only allow the use of energy saving technologies, but also the maximum implementation of alternative renewable energy sources, especially solar installations, since the area is known as the place with the most sunny days a year in Bulgaria. The region is also very rich in historical sites and natural parks.

The fact that the Elder's House will be a significant consumer of goods and services throughout the year in the region, which is of particular importance, due to the current low purchasing power and poverty of the population and poor trade turnovers. This will bring significant bustle and will stimulate the local economics.

The Elderly House will have important social and cultural functions. It will be a center for social interaction not only among its residents but also among residents and local people. The occupants can share their previous professional experience with locals. This would be beneficial for both, the local people with the possibility of gaining new skills and knowledge and the residents who could be engaged in an enjoyable, useful and rewarding work.

Due to the international character of the occupants, the project will contribute and become a catalyst for cultural exchange between people from different cultures. Since it is planned to be a home for active adults, the occupants will be able to participate actively in the cultural life of Dryanovo, which has a well-functioning local community center, with traditional and modern dance groups, internet club, folk music group, a big concert hall with 700 seats and a small art gallery.

All of the above shows the significance of the project, not only from an architectural point of view, but also as a center of important social and cultural activities, contributing for the economic development of the region and stimulating the activity of local people, helping them to change their mostly traditional thinking and timid business activity. Thus, the Home for Elderly People in Salasuka, is planned to be an important cultural and social center trilling the local activity and getting the fresh air to the life of the region.

Project task and description

The investment intention is to build a home for elderly people in the village Salasuka, Dryanovo municipality, Bulgaria, on plot № 009002 with an area of 2900 m², with a flat surface – inclination ~ 0.



The plot building properties are:

Maximum covered area – 80 % of the plot area

Coefficient of intensity – 1, 2 (total built area / plot area)

Minimum greenery – 59 % of the plot

Height of cornice – 10 meters

The building should be consisted of ground floor, two residential floors, and a covered terrace. The area of the floors can be 783 m².

1. Ground floor

On the ground floor should be located:

Kitchen with auxiliary, common laundry, canteen and common room. The aboveground part of the storey should be at least 1,4 meter, with an overall height of 2,6 meters.

2. First and second floors above ground (residential)

It's planned for each of the floors to be consisted of 60% apartments and 40% studios (deviations up to 15% are eligible).

The minimum areas of the spaces should be:

Living room – 15 m²

Single bedroom - 7,5 m²

Double bedrooms – 12,5 m²

Kitchen – 4,5 m²

Kitchen with dinning place – 7 m²

3. Roof terrace

It has to be planned for a partial closing with light sliding and overlapping elements. The vertical connection should be done with a staircase and an elevator minimum for two persons with dimensions not less than 1,2 m wide and 2,2m deep.



Photos from The Village of Salasuka



Project Situation:

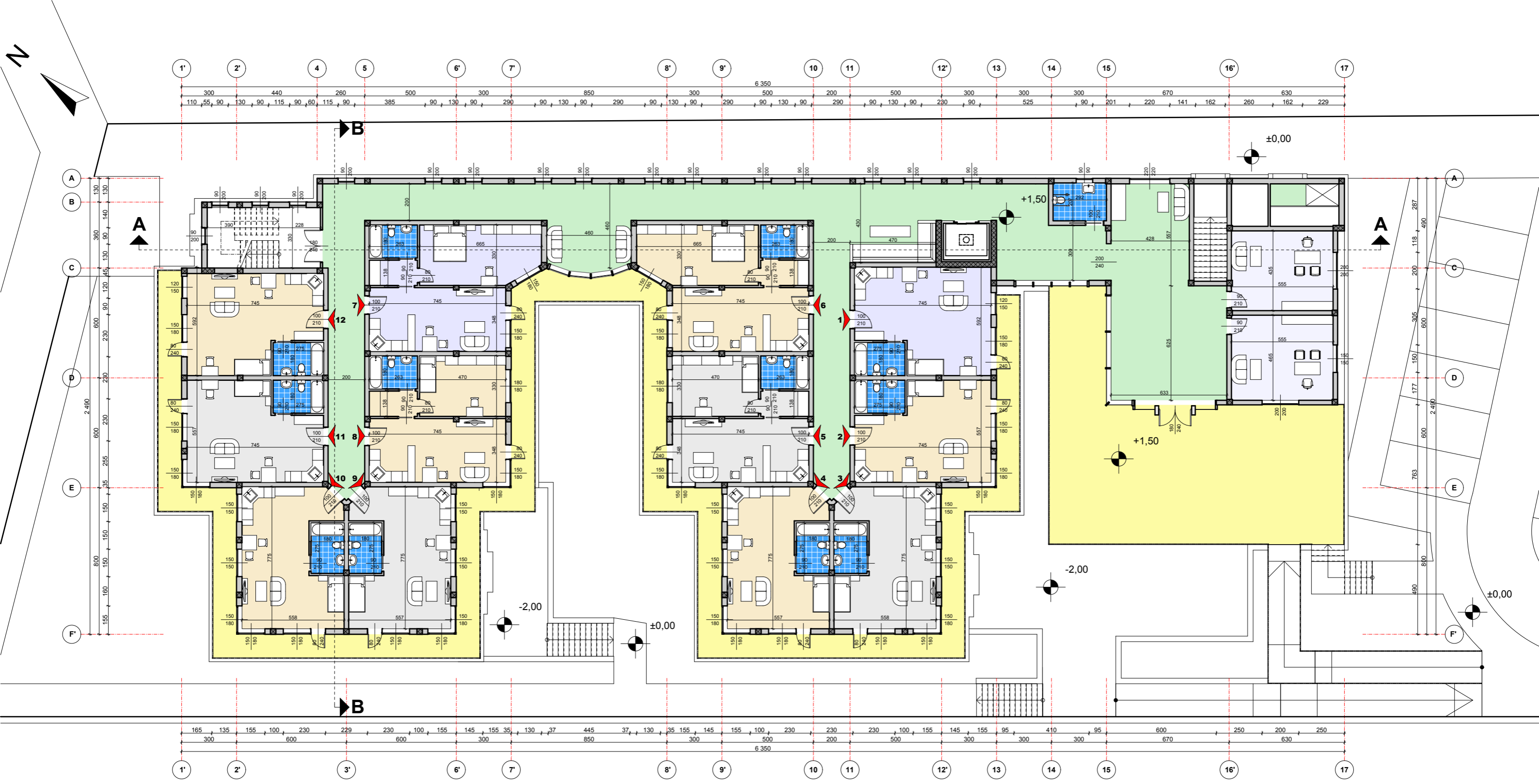


View from South:

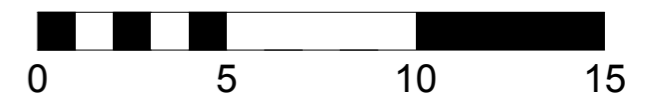


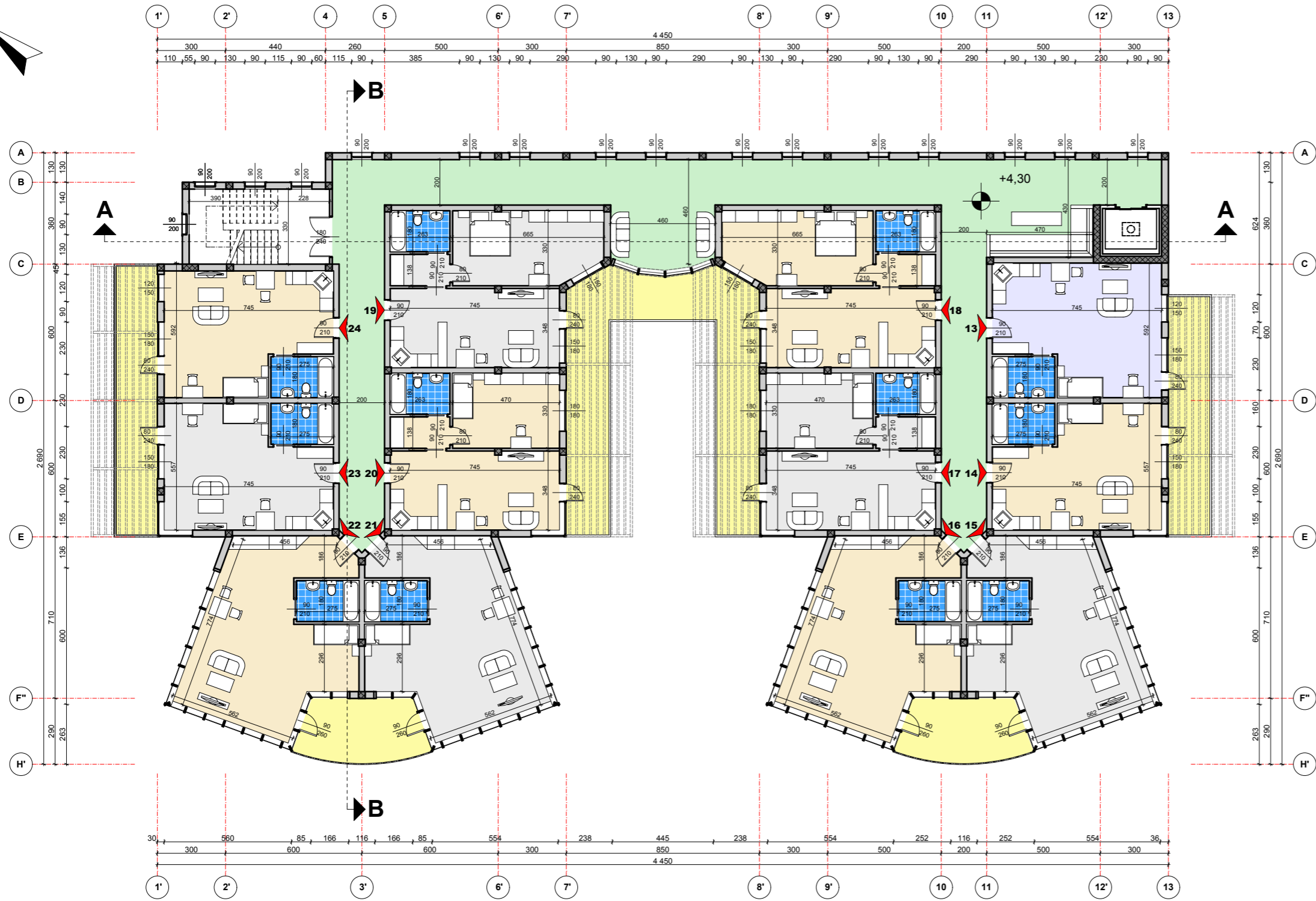
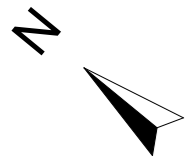
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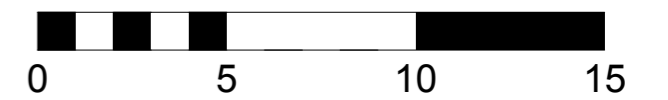


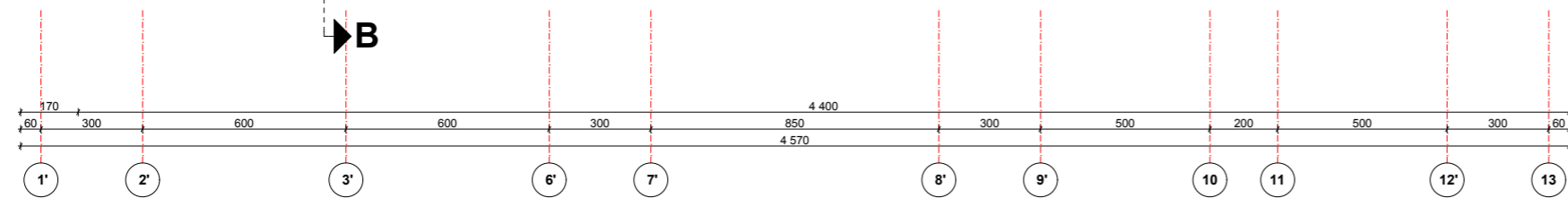
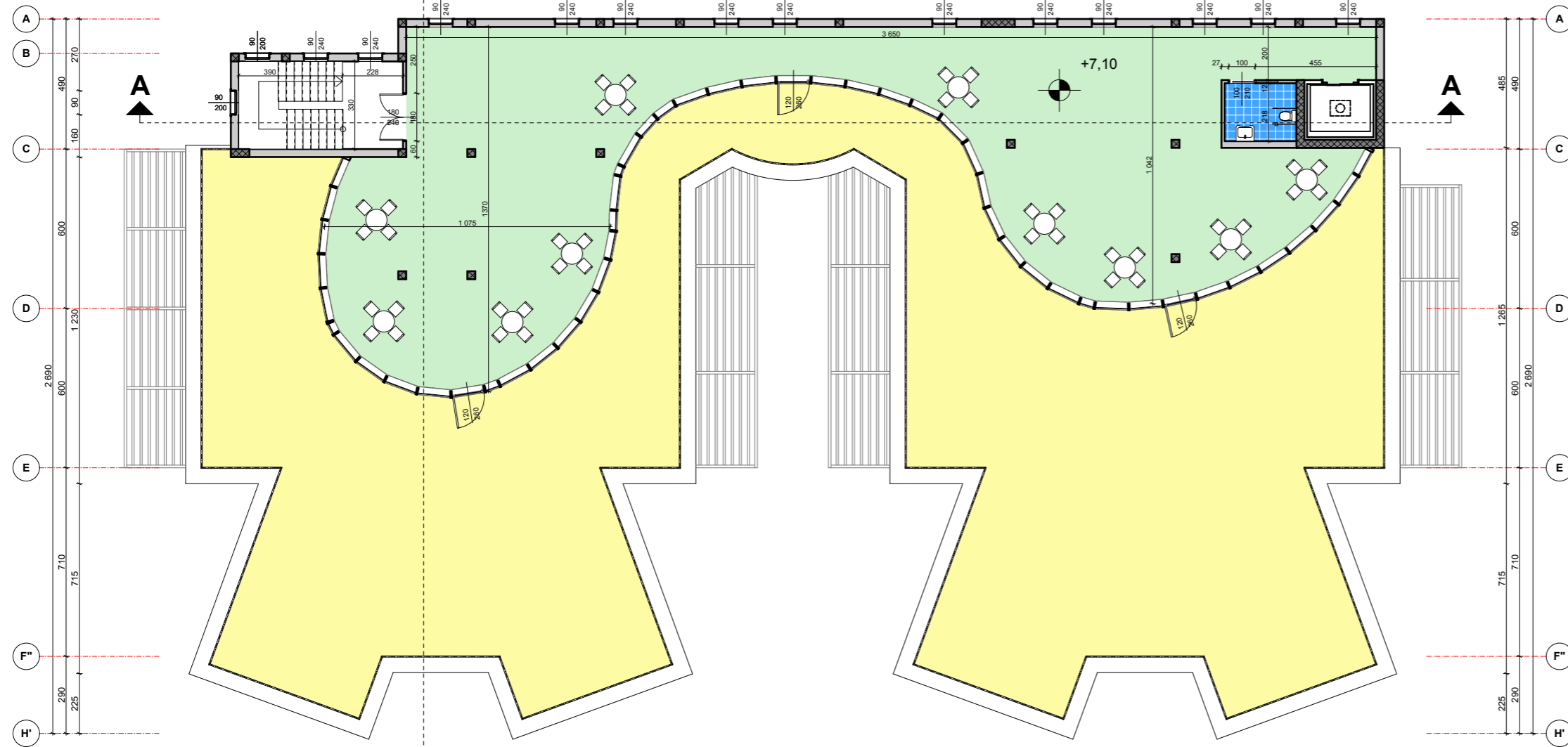
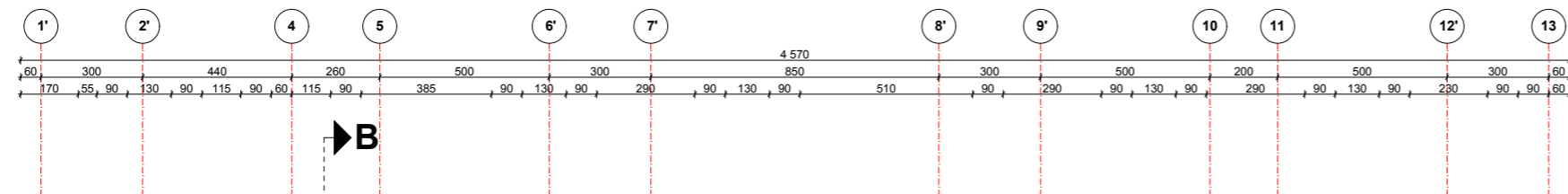
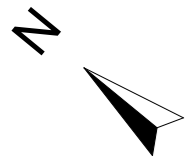
Ground Level ±0,00m
1:200



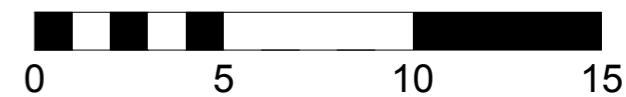


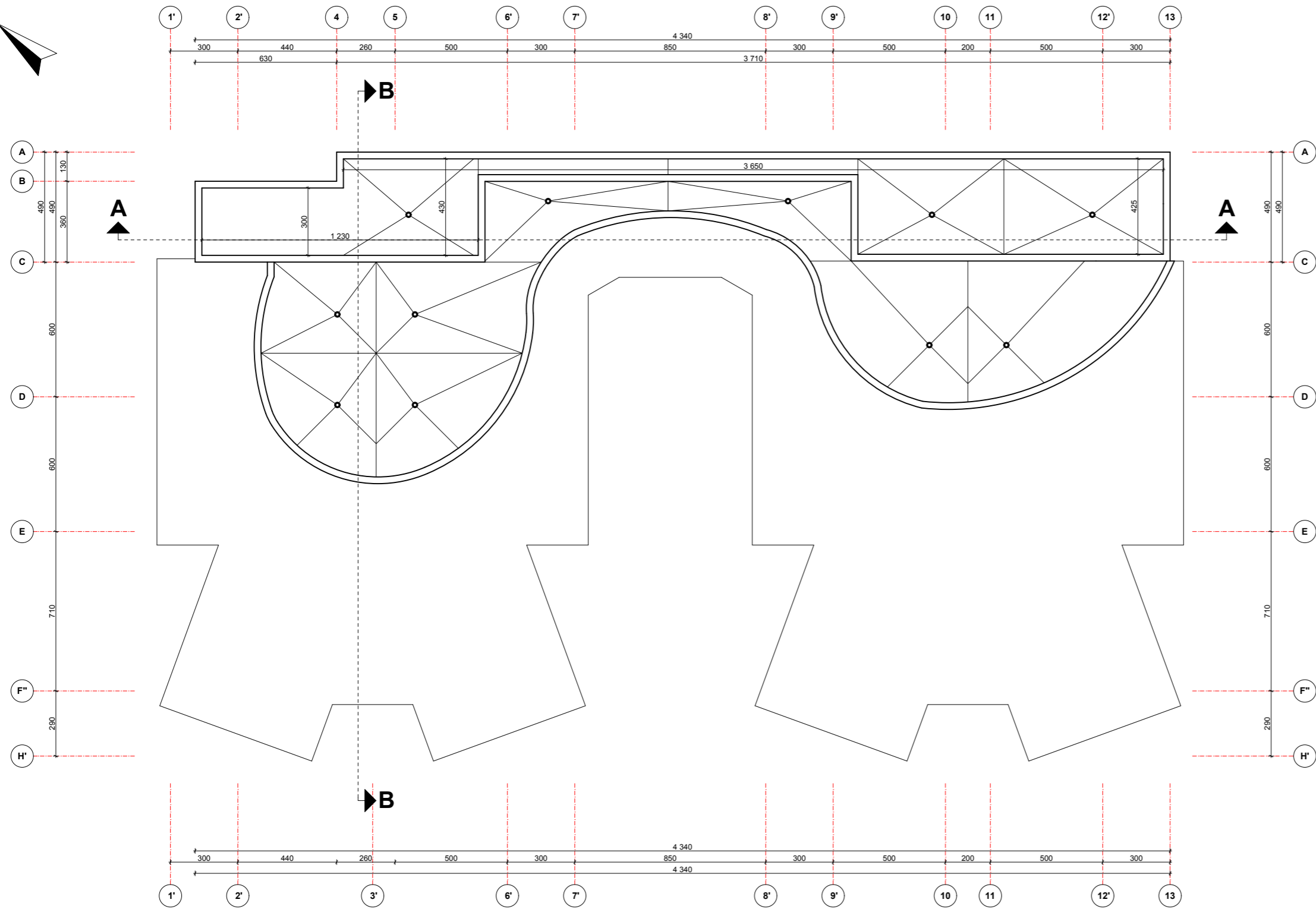
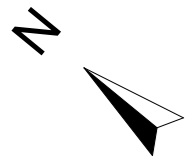
Level 1 +4,30m
1:200



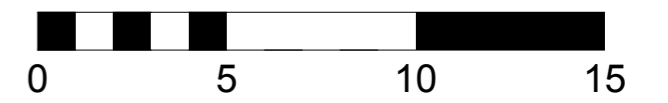


Terrace level +7,10m
1:200

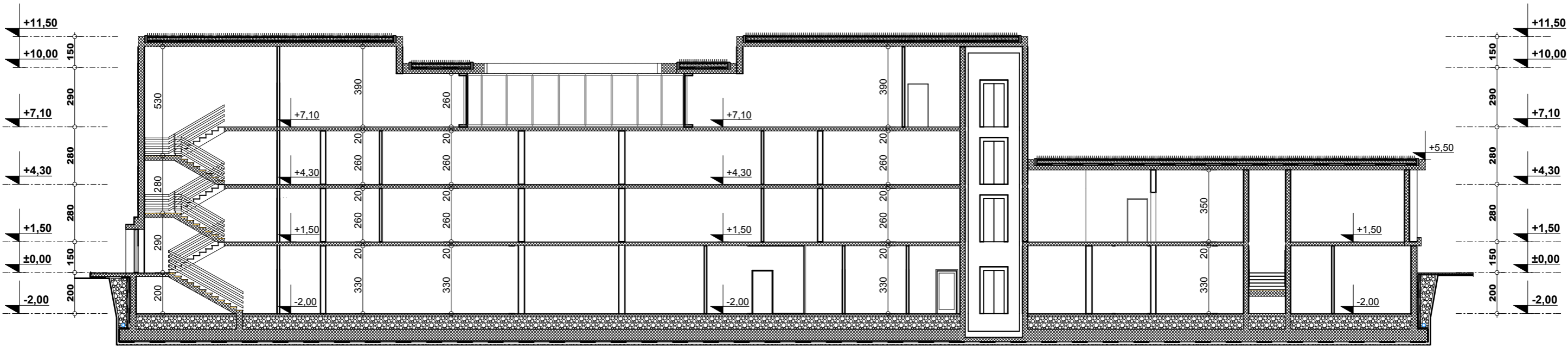




Roof plan
1:200

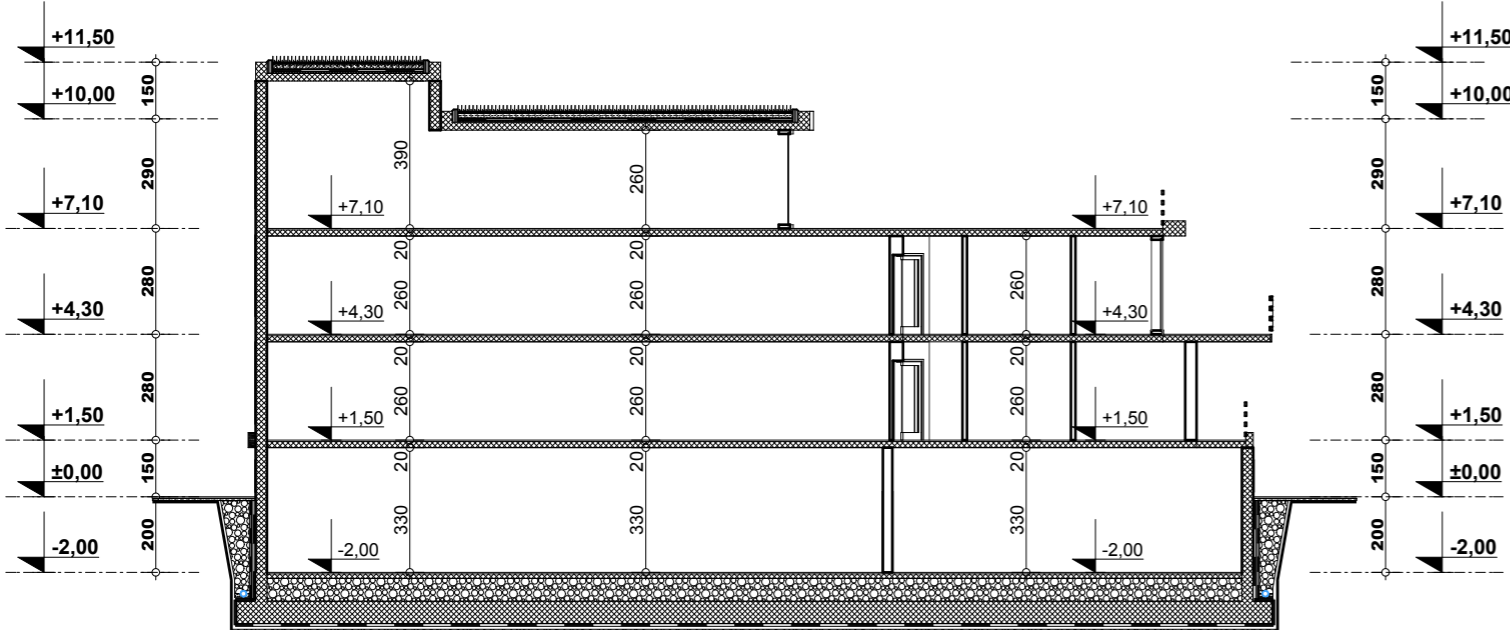


Sections:



A - A

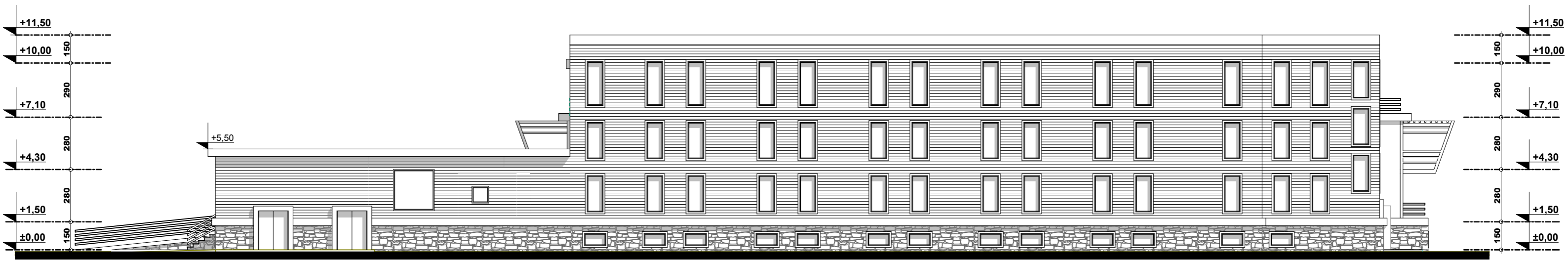
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B - B

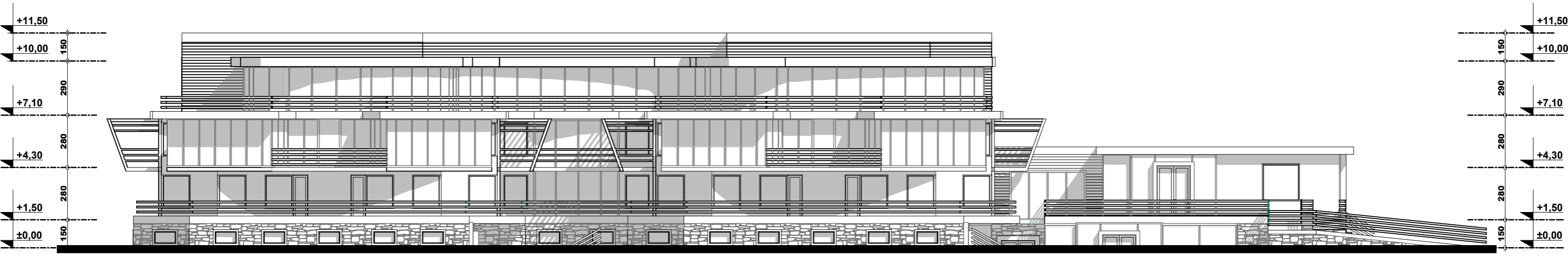
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Elevations:



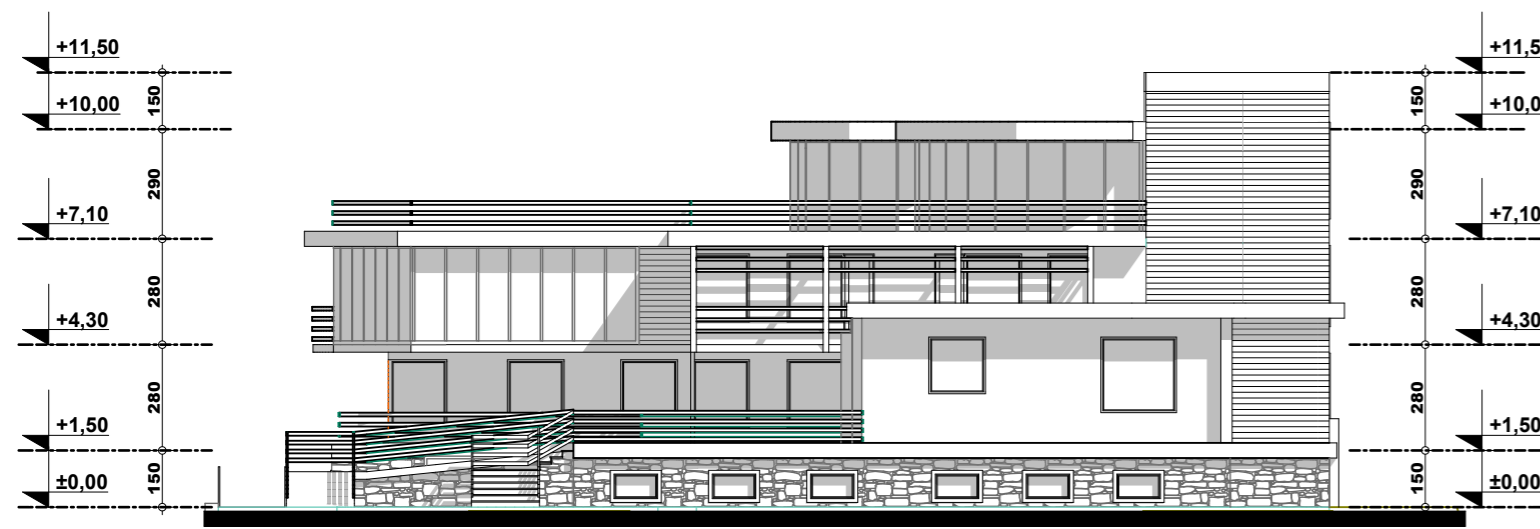
North

1:200



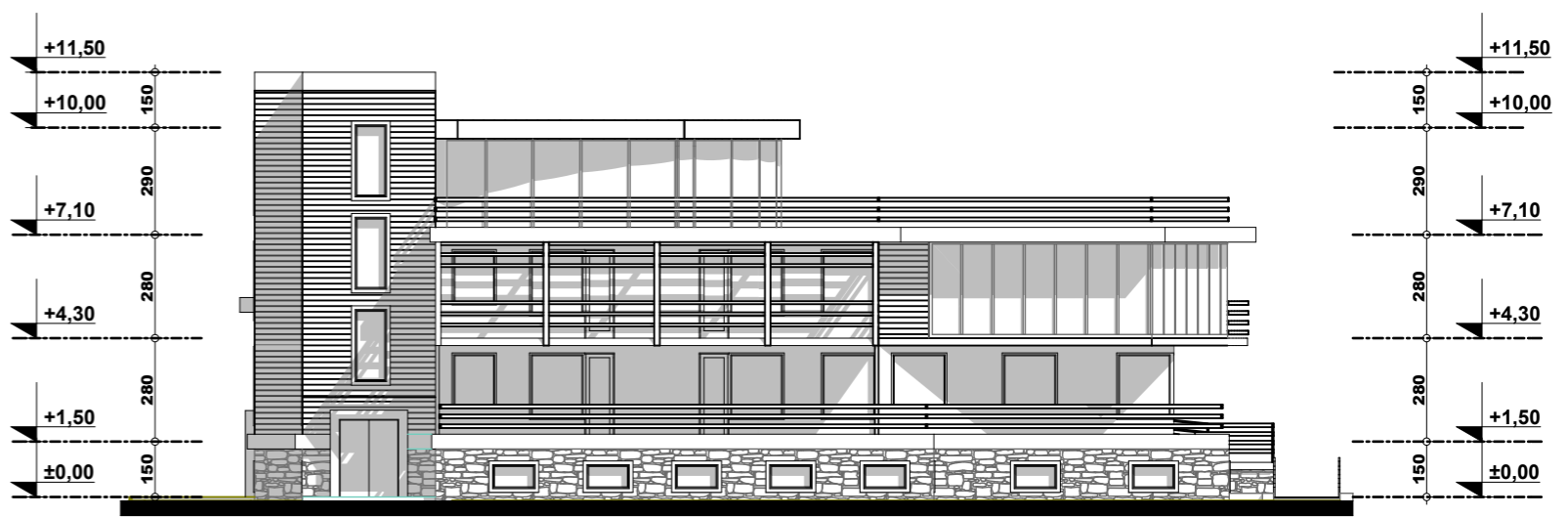
South

1:200



East

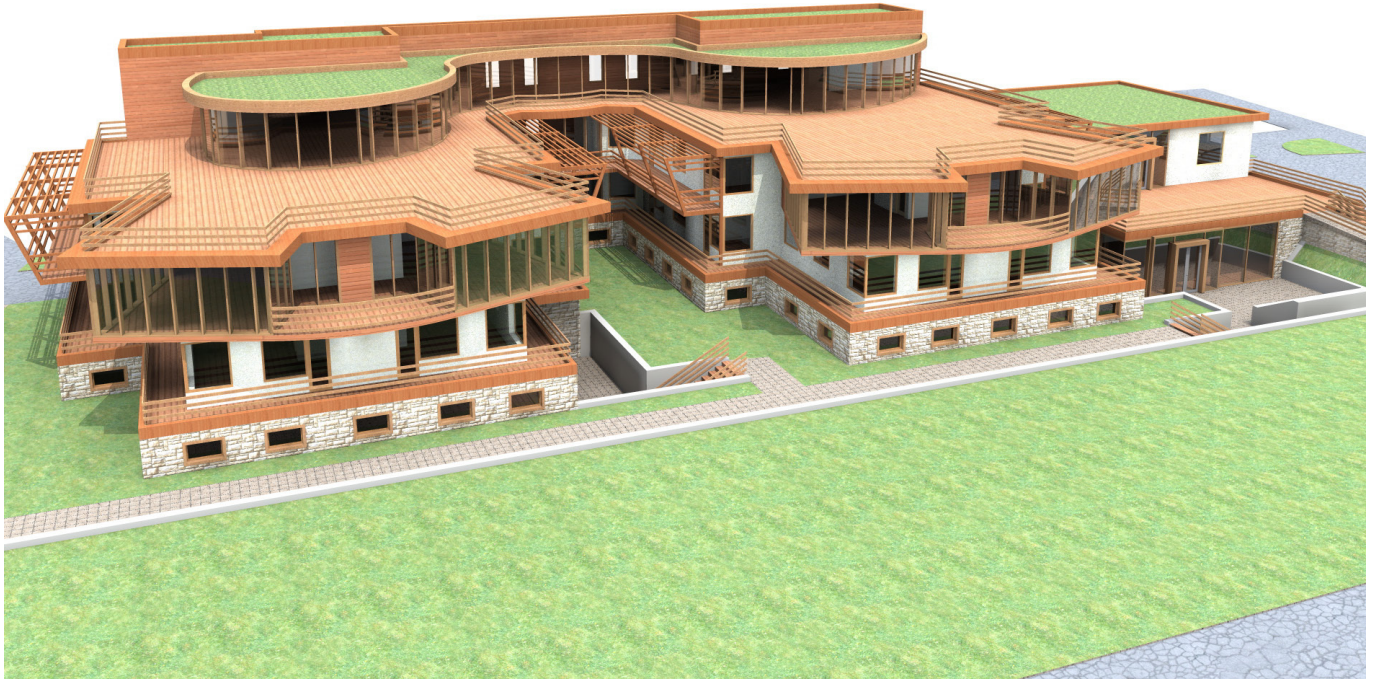
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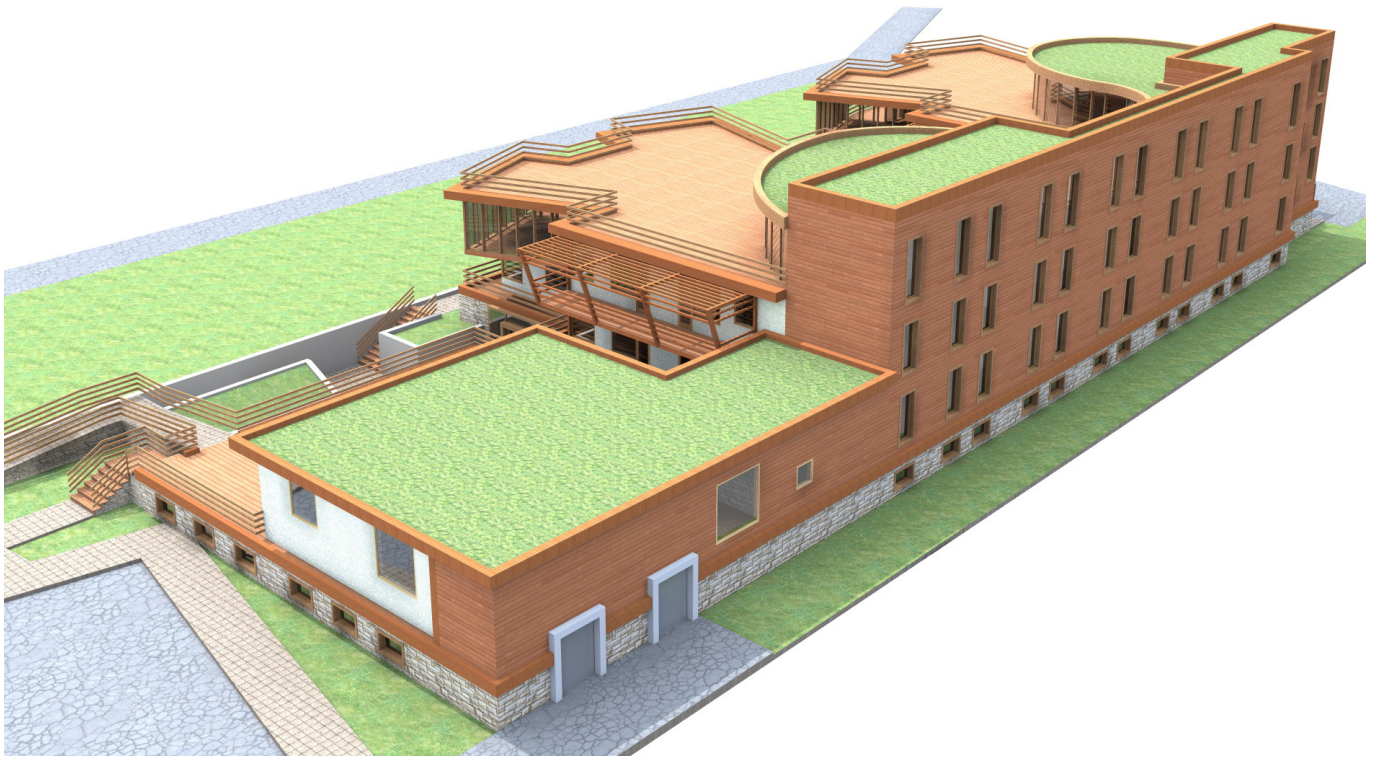
West

1:200

3D Perspective Views:







Summary and Conclusions

The current thesis project is structured in two mutually complimented parts: the first deals with theoretical aspects of the intensifying problem of “Aging Europe” that makes the need for change and reform the all system of social security and retirement more sharply-pointed. The issues of “graying” demography, the development of awareness to the human needs in specific age segment, the EU policy and world situation, the typology of retirement facilities that requires different approach in architectural design as well, the trends in relocation of elderly citizens to other countries and their role in bridging the cultures and creating a new cultural models contributing to the better cultural environment, the main principles and concepts of architectural design of senior housing and their implementation if variety of case studies are discussed and analyzed in this part of the thesis. Second part is the designing of the real architectural project for Elders House in the village of *Salasuka* in Bulgaria, that aims to apply the best known practices and principles in that type of building.

The study of senior housing design becomes more and more important as a result of demographic and lifestyle changes in the world. Today we witness how the building of the retirement facilities turns into entire industry. The United Nations has been drawing attention to the ageing of the world population since 1982, when it organized the first conference on this subject and adopted an international plan of action on ageing on this occasion. The overview of trends that were analyzed in current work shows the problem of ageing or “graying” population in Europe and the policies of EU in this sensitive matter. The first part of the study enlightens the situation in Europe and world aiming to outline the importance of the problems under study from one hand, and current “human situation” from the other. On the basis of statistics, EU documents and reports, it became obvious that in 2008, the demographic development of the European Union reached a turning point in the rapid ageing of the European population. The segment of the population aged 60 years and above should start to grow by an average of 2 million each year since then. The main conclusion is that the seniors’ needs are now and more and more will be a huge part of the real social life in our societies.

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This requires more and more attention not only by policy makers but also by the architects and designers that are very much involved in the process of housings and landscape design for elderly people. This is why in the second part the focus of the study is addressing the broad range of related and complex problematic of ageing societies such as demography of ageing, retirement and pension policies in the EU and world’s trends, the need for the modernization of social protection systems and steps taking in different countries throughout the Old Continent and beyond. Comparative analyses of ageing policies and current situation was made in order to illustrate not only the trends but the variety of attitudes and solutions both in developed and underdeveloped countries.

Unfortunately, almost all governments accepted similar policy of gradual increase in the retirement age to 67 from 65 to cope with financial pain stakes in their social security and pensions payment systems what raises social turbulences and justified anger in the societies.

Respectively the forms of elder care provided vary greatly among countries and is changing rapidly. Even within the same country, regional differences exist with respect to the care for the elderly. The third part deals with issues common to all EU health care systems and technologies applied.

Consequently, it has been observed that the demand for health care tends to increase more than proportionally to the per capita income and is determined by standard of living and level of education. The efforts are made in EU to create the networking systems that can contribute to the improving of general practice care for older people in Europe. More and more the concept of an integrated long-term care service shapes and unifies the new concepts. The aim is to improve social care for older people comparing and evaluating different modes of care delivery by identifying structural, organisational, economic and social-cultural factors and actors that constitute an integrated and sustainable care system with enhanced outcomes for all actors involved

From the market point of view, the prospects for providers of assisted living housing look extremely promising. On the basis of analyses of the situation in elder's care sector the estimated number of potential customers is rapidly rising, and they can be expected to have lengthy stays at assisted living communities. At the same time there is currently a limited supply of assisted living communities. This all creates opportunities for proactive companies. The hospitality industry may be one of the beneficiaries.

In past few decades another trend is quite visible – to choose living in a country with lower life expenses. Where would you like to retire to? Lately this is a question under consideration for many Europeans that are at the threshold of retirement. Moving elsewhere becomes a real alternative for a lot of peoples in EU countries trying to preserve their living standards despite of decreasing incomes after retirement. Employees in Germany, Ireland and the UK were least happy at the prospect of retiring in their home country, with around half of the respondents stating they would want to move elsewhere. While the most attractive destinations are Spain and France, latterly Bulgaria is appeared as an alternative with a lot of relative advantages especially after becoming an EU member. Further explored are the advantages and examples of this trend of EU citizens to relocate to Bulgaria through their own words. To conclude that while building industry is in stagnation in the last few years due to the financial and economic crisis in all EU, especially neighboring Greece, elderly housing has its great potential to grow especially if the country succeed to increase the interest of the EU elders and to keep the “flux” of European pensioners permanent. In this part of research is disclosed the most attractive features of Bulgaria related to its rich historical heritage, multicultural background, natural and climatic pluses, price level that allows “A house to be bought for the cost of a car”.

This trend will create a model for a cultural dialog in culturally diverged societies in the West and the East of European continent. The more “European Communities” be created in the country, the stronger will be the impact of transition of values and ways living in developed democracies, the more values and societal experience will be transferred to the local life, the better functioning of local institutions can be expected. The conclusion that the coercion between so different cultures being “split” during the history will be re-created and strengthened with positive results for the Bulgarian society as a whole. The special emphasis is made on the description of the region where the project for elders housing will be built, constitutes the practical part of the current thesis. Not only the mountainous scenery, historical and cultural heritage of the network of small but attractive towns, a considerable part of which are listed in the UNESCO World's Heritage, were discussed but also the specifics of architecture and architectural physiognomy was presented in this chapter.

Contemporary architects however have to face a world without certainties to base their work on. The only one certainty left in architecture nowadays is that architecture is designed for the people who live in it, work in it, and are represented through it. Architecture is a major tool to express culture, identity and the ideology of people. Architecture is a physical statement of anthropology. And it is the field of anthropology that has put more effort into cultural studies and the overall understanding of the human being than any other discipline. This is why the attempt to give deeper and overlay pictures of the cultural context of the region where the project is taken place.

The need to create a high quality townscape with an accompanying approach to landscape in the planning of new or extended communities cannot be understated. It is vital to establish a broader sense of community and create other opportunities for civic, commercial and cultural activities that engender collective pride. Townscape is of appropriate quality to reflect the character and aspirations of the community and contributes to its identity. The main conclusion of this situation is that the natural habitat within towns is to be enhanced by careful and considered design. This attitude was followed latter in designing the elders' facility project in *Salasuka* village. The synergy between architectural tradition and global trends in our post-modern world was sought in conceptualizing the design of the complex. Thus, multipolar model and multidisciplinary approach were sought in determining the urban and territorial strategies in the project designing. A holistic

approach, combining a multipolar model of urban-territorial regeneration and management with a multidisciplinary vision was considered.

The architects play the leading role in giving practical solution to the growing needs of seniors housing sector. First of all the architect should be familiar with the typology of seniors housing and specific needs that rises out of that. The main themes, principles and concepts in elders housing achieved by prominent architects and researches were studied in order to form a start-point in design solutions in this particular investor's assignment. Human-centered universal design is essential in the development of all new senior housing concepts. They provide the basis for increased accessibility, safety and health for a diverse population. The Seven Principles of Universal Design, developed in 1997 also pointed the way to the implementation of this approach. 10 case studies including 2 in Bulgaria were analyzed from the point of view of the main 12 principles as set up by Reigner and Pynoos in their fundamental monograph "Assisted Living Housing for the Elderly". The features of all case studies were displayed from a comparative perspective and best viewed in a table showing the degree of implementation of those main principles of architectural design in different case studies. .

From this starting point the second (practical) part of the thesis was developed, i.e. the architectural project of Elder's House in Salasuka Village. The project aims to become exemplary for future developments in the country as such buildings are still rarity and have great perspectives for the future. The home for Elderly People located in Salasuka village, Central Bulgaria, is a real project, developed alongside with an investor's task with strict parameters. The architectural aim is to harmonize as much as possible the investor's requirements with the best world practices and thus achieving the goal of fully meeting the new, higher standards and principles, described in the previous Chapters, while tailoring the building to the specific climatic and area conditions.

First of all, an analysis of the location regarding the historical heritage, tourist routes and itineraries, infrastructure condition and proximity to the modern cultural networks were discussed and presented. The second but most important was the investor's assignment and its' requirements regarding the quite limited amount of investment and the plot sizes on which the maximum living area should be developed. The thirds challenge came from the need strictly to follow the rules set up in the frames of national Building Code. The main aims of the project are to ensure the accessibility for the inhabitants, home-like environment, adaptability, social interaction, sensory aspects, familiarity, relative privacy (rooms and studios), low cost of living, aesthetics that came out of wide window wall, terraces, green architecture elements (green roof), comfort and safety.

The Elderly House will have important social and cultural functions. It will be a center for social interaction not only among its residents but also among residents and local people. The occupants can share their previous professional experience with locals. This would be beneficial for both, the local people with the possibility of gaining new skills and knowledge and the residents who could be engaged in an enjoyable, useful and rewarding work. Due to the international character of the occupants, the project will contribute and become a catalyst for cultural exchange between people from different cultures

All of the above shows the significance of the project, not only from an architectural point of view, but also as a center of important social and cultural activities, contributing for the economic development of the region and stimulating the activity of local people, helping them to change their mostly traditional thinking and timid business activity. Thus, the Home for Elderly People in Salasuka, will be an important cultural and social center trilling the local activity and getting the fresh air to the life of the region.

The red line in this project is to melt the theory and practice in a harmony of principles of architectural design and functionality.

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