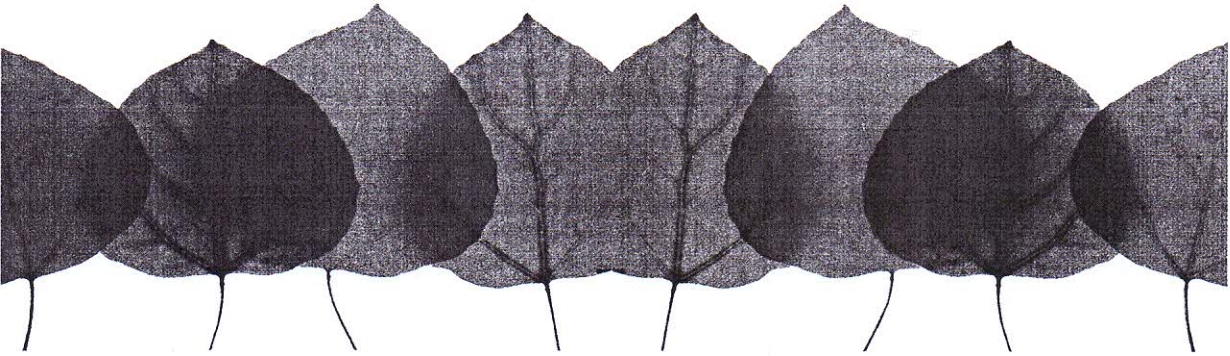


The SAGE Handbook of  
**Aging, Work and Society**



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# Policies for Older Adult Learning: The Case of the European Union

Marvin Formosa

## INTRODUCTION

Older adult learning has gained an ever-present presence in international and national policies on lifelong learning. An increasing preoccupation with the crises in fiscal competitiveness and political integration has elevated lifelong learning in later life as a key tactic in improving economic development and social cohesion. Older adult learning is presently regarded as a necessary lubricant for a smooth transition to an upcoming scenario where the number of older adults will outnumber children, a state of affairs that will have deep socio-economic impacts on post-industrial societies. The European Union (EU) is no exception. Continuous learning through life deemed as a comprehensive strategy to meet the requirements for a Single European Market as well as address the repercussions of increasing structural unemployment. In view of the aging of European society – due to falling birth rates, shrinking family sizes, fewer

numbers of young people in the labour market, and increasing life expectancies – recent EU directives on lifelong learning advised formal and non-formal learning providers of education to plan and implement further educational opportunities for older adults (EC, 2006a, 2007). Indeed, the EU considers late-life learning as a positive investment on the basis that not only it engenders positive returns of economic growth, but also improves the quality of life and social development of older persons. This chapter presents a critical analysis of that interface between older adult learning and lifelong learning in a EU context. It includes four parts. Whilst the first introduces the key dynamics of older adult learning, the second focuses on EU policy on lifelong and late-life learning. The third part provides a constructive critique of EU policy on older adult learning by uncovering a range of social, economic, and ageist biases. The final part forwards proposes a future agenda for late-life learning policy for the EU.

## OLDER ADULT LEARNING

Older adult learning refers to the process in which older adults, 'individually and in association with others, engage in direct encounter and then purposefully reflect upon, validate, transform, give personal meaning to and seek to integrate their ways of knowing' (Mercken, 2010: 9). As is expected, older adult learning takes place in formal, non-formal, and informal avenues. Older adults constitute a minority in formal education. For instance, a study on higher education in the United Kingdom (UK) found that during the 2008–2009 academic year only some 4,000 first-year students (0.7 percent of total) aged 50-plus were enrolled in undergraduate and postgraduate courses (Phillipson and Ogg, 2010). This age-group was, however, better represented with respect to part-time study, comprising 15 and 10 percent of part-time undergraduates and postgraduates (respectively) which, in numerical terms, totalled up to 62,000 students (*ibid.*). On the other hand, non-formal learning avenues have always been highly successful in attracting older adults. The past three decades saw a steep proliferation of third-age learning programs catering exclusively to the interests of older adults such as Universities of the Third Age, Elderhostels, Lifelong Learning Institutes, and University Programs for Older People (Findsen and Formosa, 2011). In Europe, trade union education, liberal education, folk high schools, as well as universities and non-formal study circles are amongst various types of learning open to third agers. In North America, practice in older adult education has transformed itself from operating in a social service framework to an entrepreneurial one and part of the so-called 'silver industry'. However, one also finds various examples of late-life learning programs in low-income countries (*ibid.*). The appeal of non-formal learning lies in the opportunity to engage in serious learning projects, socialize with peers, and engaging in physical and cognitive activities, but without any pressures of accreditation and assessment whatsoever. Similarly,

older persons are also extensively involved in informal modes of learning – in a variety of contexts ranging from the family, religious institutions, mass media, the workplace, volunteering, and various community-based initiatives – as well as through the creative use of museums, theatres, libraries, online surfing, and travel (Findsen, 2005).

Comparative data on participation rates are sporadic, and the few that exist tend to be 'unreliable' and 'not comparable' as they include different definitions of 'non-formal' and 'informal' learning (Percy and Frank, 2011). It is lamentable that most educational statistics – including those issued by Eurostat – take the age of 65 as a cut-off point. Yet, a review of the literature elicits three persistent findings – namely, a lower percentage of elder learners compared to younger peers, a sharp decline of participation as people reached their seventh decade, and that typical learners are middle-class women so that the working classes, older men, and elders from rural communities and ethnic minorities are highly underrepresented. A recent survey conducted in the UK concluded that 'the older people are, the less likely they are to participate in learning', with participation declining especially 'for those aged 55 and over, such as that only 33 per cent of adults aged 55–64, 23 per cent of adults aged 65–74 and 14 per cent of those aged 75 and over regard themselves as learners' (Aldridge and Tuckett, 2010: 19). Various propositions have been put forward to explain why participation declines with age. Whilst there will always be some older persons who are not interested in taking part in learning activities, the consensus is that potential participants face four types of barriers which become more intense with increasing chronological ages. These include situational barriers (obstacles relating to the unique circumstances of later life), institutional barriers (unintended barriers erected by learning organizations that exclude subaltern elders), informational barriers (failure of agencies to communicate what learning are available), and psychosocial barriers

(attitudinal beliefs and perceptions that inhibit a person's participation) barriers (Findsen, 2005).

For many years, older adults have been stereotyped as participating in more expressive than instrumental forms of learning. This developed out of the assumption that in retirement people prefer to devote time to personal development tasks as opposed to learning vocational skills associated with the labour market. Yet, whilst the interest of older adults to engage in expressive learning programs can never be overstated, this narrow and binary approach to describe educational participation in later life is obsolete nowadays. Whilst in the UK information and communication technology has taken over from the humanities as the most popular subject, with more than half the learners over 65 claiming 'computer skills' as their main subject of study (Aldridge and Tuckett, 2010), a Canadian survey found older learners to be highly goal-oriented so that participation in technological learning programs ranked highest amongst respondents (Sloane-Seale and Kops, 2004). Another study, specifically geared towards older adults from economically deprived areas of Glasgow (Findsen and McCullough, 2008), also provides firm evidence that older people are greatly motivated to study a wide range of instrumental forms of curriculum. It is also noteworthy that in OECD (Organization for Economic Co-operation and Development) countries some 25 percent of older workers (55+) were found to have participated in training programs, although in some countries – such as Japan (51 percent) – participation rates were even higher (OECD, 2004). This shift reflects wider and important changes in aging transitions. Whilst many older adults continue to pursue learning for pleasure purposes, an increasing number are engaging in learning to enhance or change their careers, to fulfil lifelong ambitions, and seize the opportunities that they were denied earlier in life. Retirement is no longer a passive stage of the life course where incumbents reach out to learning simply to age actively and successfully. Rather, it should be acknowledged that

older people are active and useful citizens who seek out learning opportunities that aid them to continue living their lives as productively as possible.

A key debate in older adult learning is concerned not with 'whether we can or cannot teach or retrain an older adult' but 'to what end?' and 'why?'. Late-life learning is commended for aiding adults adjust to the transformations that accompany 'old age' such as decreasing physical strength and health, the retirement transition, reduced income, death of spouse, and changing social and civic obligations (Rowe and Kahn, 1999). However, Glendenning and Battersby (1990) posited a more radical agenda and bestow late-life learning the task of achieving the 'liberation of elders' – that is, empowering older persons with the advocacy skills necessary to counter-act the social and financial disadvantages brought on by neo-liberal politics of aging. From a humanistic point of view, learning is perceived as a 'personal quest', a necessary activity if older adults are to achieve the potential within them (Percy, 1990). This rationale prioritizes 'process' over 'content' by stressing that the role of an educator 'is to facilitate the process of learning for the learner rather than persuade him [sic] to social action or to be dissatisfied if a certain political awareness is not achieved' (ibid.: 237). Finally, transcendence rationales argue that learning must not let adults forget that they are old and are to enable them 'to know themselves as a whole, as they really are, in the light of finitude and at the horizon of death' (Moody, 1990: 37). Learning thus arises as an opportunity to explore goals that younger peers are too busy to pursue such as developing a reflective mode of thinking and contemplating the meaning of life. Although these rationales include various valid arguments, it is also possible they miss the point. Industrial societies have now reached a 'late' phase of modernity, wherein people's lives are characterized by 'instability' and 'risk' – economic, political, and social – and hence, personal and social disorientation. In Bauman's words,

Society is being transformed by the passage from the 'solid' to the 'liquid' phases of modernity, in which all social forms melt faster than new ones can be cast. They are not given enough time to solidify, and cannot serve as the frame of reference for human actions and long-term life-strategies because their allegedly short life-expectation undermines efforts to develop a strategy that would require the consistent fulfilment of a life-project. (Bauman, 2005a: 303)

In the contemporary life-world, aging has become increasingly marked by a blurring of what appeared previously to be the typical behavior associated with this stage. Whilst in the past the aging self was based on occupational biographies and incumbents' relationship to the welfare state, presently 'the old have moved into a new "zone of indeterminacy" [so that] growing old is itself becoming a more social, reflexive and managed process, notably in the relationship between the individual, the state and a range of public as well as private services' (Phillipson and Powell, 2004: 21, 22). Yet, the aforementioned rationales persist in operating within 'grand narrative' frameworks which embed older adult learning in strict, and therefore, limiting ideological constraints. Overcoming such a lacuna necessitates the shifting of 'the debate away from the policy maker and practitioner perspectives on *education* towards *learning* [to] ensure that the voices of older learners themselves, hitherto largely ignored, can emerge' (Withnall, 2006: 30 – italics in original). Indeed, what is needed is 'a more comprehensive analysis of all the various dimensions and features of the nature, aims and purposes of policies for realizing a life-long approach to learning for all' (Aspin and Chapman, 2000: 16). Following Withnall (2010 : 116), this warrants that late-life learning brings the 'need for economic progress and social inclusiveness in tandem with recognition of individual desires for personal development and growth as people age'. A key attraction of this vision is that it enables the possibility of granting priority to both the process and content of older adult learning, depending on whether the goal is personal or

social transformation (ibid.). Indeed, policies should offer a range of tangible benefits – at individual, community and societal levels – by spreading out to all facets of later life, and recognizing that learning takes place in a variety of everyday contexts ranging from formal classrooms, self-directed learning, voluntary organizations, residential and nursing homes, to intergenerational settings. As Withnall (ibid.) underlines, it is only so that policies on late-life learning will succeed in becoming embedded in an 'operational belt' (strategies) guided by an 'ideological core' (values). It is against such ontological and epistemological backdrops that the EU directives on older adult learning will be examined and discussed.

## EU POLICY AND OLDER ADULT LEARNING

In recent years it has become virtually impossible to locate a policy document issued by the European Commission (EC) that makes no reference to lifelong learning. Of course, it is erroneous to think that lifelong learning emerged onto the EU policy scene with the suddenness of a new fashion. The idea was widely touted in the late 1960s, and even experienced a degree of political flavour early 1970s. Indeed, any discussion on the EU's take on lifelong learning will be amiss if it overlooks the fundamental role of the intergovernmental bodies of UNESCO (United Nations Educational, Social and Cultural Organization) and OECD in the genealogical development of lifelong learning. In particular, the UNESCO report *Learning to Be* (Faure et al., 1972), as a public statement on the principles of lifelong education, was crucial in fostering a global debate. Herein, education was postulated to 'last the whole life for *all* individuals and not just be tacked on to school or university for a privileged or specialized few' (Field, 2000 : 6 – italics in original), and hence, serve to 'initiate an optimistic phase of international education policy and reform, and also as the beginning

of the debate over lifelong education' (Knoll, original emphasis, quoted in Field, 2000: 6). On the other hand, OECD's rationale was embedded in terms of human capital thinking, albeit laced with a few dashes of social democracy. In *Recurrent Education: A Strategy for Lifelong Education*, the OECD (1973) stressed the need of high quality pre-school and compulsory education if lifelong learning is to have effective meaning for the population as a whole, the necessity of school curricula to lay the foundations for lifelong learning, the vital roles of qualifications and technology to open lifelong learning opportunities, the necessity of a dialogue on the financial aspect of lifelong learning (especially the prospect of paid educational leave), and an urgent focus on how demographic trends (such as the rising number of older workers) will impact lifelong learning patterns.

The EU responded to such an international debate by commissioning its own policy enquiry. A 1974 communication on education in the European Community put forward the concept of 'education permanente' – that is, 'planned learning from cradle to grave' where 'the Community's specific responsibilities within this strategy should include promotion of foreign languages, staff and student exchanges between schools and universities ... through each individual's working life' (Field, 1998: 30). Yet, the limited power of the EC over member states' educational policy meant that during the 1980s there were no unique developments regarding this matter. It was only after the concept of lifelong learning constituted one of the cornerstones of Jacques Delors' white paper on competitiveness and economic growth that it became possible to distinguish the EU's thinking from that of other agencies:

Preparation for life in tomorrow's world cannot be satisfied by a once-and-for-all acquisition of knowledge and know-how ... All measures must therefore must therefore necessarily be based on the concept of developing, generalizing, and systematizing lifelong learning and continuing training. (CEC, 1994: 16, 136)

The Commission subsequently declared 1996 to be the European Year of Lifelong Learning and published a series of directives that left no doubt as to the lynchpin status of the concept in EU socio-economic and political policy. This 'fixation' with lifelong learning reflects two key facets of the EU's modus operandi – namely, economic competitiveness and citizenship. On one hand, the EU shares the dominant global concern with regard to the strategic importance of lifelong learning 'in meeting the challenges of globalization and the emergence of knowledge economies, promoting the competitiveness of national economies, creating jobs and reducing unemployment, and securing the social inclusion of groups at risk of exclusion' (Hake, 2006: 37). Indeed, lifelong learning has been adopted as the basis of the EU's education and training strategy to achieve the Lisbon objective – namely, making the continent 'the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion' by 2010 (EC, 2000a: 3). On the other hand, the EU believes that lifelong learning holds the potential to unite the member states of this diverse continent into a coherent whole. Although the initial countries in the union were wealthy capitalist countries from Western Europe with a great deal of common and overlapping history, the EU now incorporates countries from both the Eastern Bloc and Southern Europe that have a very differentiated history and are less economically advanced. It was emphasized that

Lifelong learning will facilitate an enhancement of citizenship through the sharing of common values, and the development of a sense of belonging to a common social and economic area. It must encourage a broader-based understanding of citizenship, founded on active solidarity and on mutual understanding of the cultural diversities that constitute Europe's originality and richness. (EC, 1997: 4)

Following the millennium, the EC published the *Memorandum on Lifelong Learning*

(2000b) and *Making a European Area of Lifelong Learning a Reality* (2001: 33) where lifelong learning was defined as 'all learning activities undertaken throughout life with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment related perspective'. In June 2002, the European Council of Heads of State and Governments adopted a *Resolution on Lifelong Learning*, as the guiding principle for the reform of education and training in the member states, and which argued that lifelong learning is an 'indispensable means for promoting social cohesion, active citizenship, personal and professional fulfilment, adaptability and employability' (CEC, 2002: 1). Furthermore, it was underlined that lifelong learning 'should enable all persons to acquire the necessary knowledge to take part as active citizens in the knowledge society and the labour market' (ibid.).

Older persons were a late entry in policy documents, as it was only in 2006 – some eleven years after the first policy document – that late-life learning was first mentioned. This was during a time when the EU was expressing serious reservations as to whether member states were making adequate progress towards the targets of economic growth and job creation established in Lisbon, and was also preoccupied by the decreasing average age at which older persons exited from the labour force into retirement (EC, 2006b). Arguing that the participation of older workers in the workforce is vital to the development of socially inclusive economies and the reduction of the risk of social exclusion among the older population, the EU issued directives calling for active employment policies to discourage older workers from leaving the workforce and the development incentives to stay in work (CEC, 2004). Although the key argument consisted in that lifelong learning and access to training must provide older workers with the necessary skills to adapt to changes on the employment market, with the EU encouraging member states to use the European Social Fund to develop active labour market policies (ibid.),

the subsequent documents *Adult Learning: It is never too late to learn* (2006a) and *Action Plan on Adult Learning* (2007) attempted at developing a more holistic approach to older adult learning. Stressing that the growing numbers of retirees in Europe should be regarded as a potential source of educators and trainers for adult learning, the former posited two objectives for lifelong learning as far as older adults are concerned:

[1] to ensure a longer working life, there is a need for up-skilling and increasing lifelong learning opportunities for older workers. It is widely acknowledged that in order to keep older workers employable, investment is needed throughout the life cycle and should be supported by government, professional bodies and sectors ... [2] an expansion of learning provision for retired people is needed (including for instance increasing participation of mature students in higher education) ... Learning should be an integral part of this new phase in their lives ... the Commission invited universities to 'be more open to providing courses for students at a later stage of their life cycle'. Such provisions will have a vital role in keeping, retired people in touch with their social environment. (EC, 2006a: 8–9)

The *Action Plan on Adult Learning* (EC, 2007) reiterated the assumption that in a knowledge-based and aging society access to lifelong learning is a condition for both economic growth and social cohesion. However, although it calls upon member states to ensure sufficient investment in the education of older people, it is disappointing that the document does not address the issue of late-life learning in any specific detail. As the following excerpt shows, the directive seeks to locate one solution for all vulnerable citizens:

This Action Plan focuses on those who are disadvantaged because of their low literacy levels, inadequate work skills and/or skills for successful integration into society ... these could include migrants, older people, women or persons with a disability. It starts from the premise that the need for a high quality and accessible adult learning system is no longer a point of discussion, given the challenges Europe has to meet in the coming years: [i] to reduce labour shortages due to demographic changes by raising skill levels in the workforce generally and by upgrading low-skilled



workers ... [ii] to address the problem of the persistent high number of early school leavers (nearly 7 million in 2006) ... [iii] to reduce the persistent problem of poverty and social exclusion among marginalised groups ... [iv] to increase the integration of migrants in society and labour market ... [and v] to increase participation in lifelong learning and particularly to address the fact that participation decreases after the age of 34. (EC, 2007: 3)

In an attempt to link policy with practice, as well as aiding member states reach the directives' objectives, the EU coordinates the Grundtvig program which provides funding for projects on lifelong learning. Priority 6 in the Grundtvig guide pledges financial resources to learning programs related to teaching and learning in later life, and 'inter-generational and family learning' (EC, 2010). More specifically, funding is promised to programs engaging in '[i] transferring knowledge, methods and good practice for senior citizen education, [ii] equipping senior citizens with the skills that they need in order to cope with change and remain active in society, [iii] strengthening the contribution of older people to the learning of others, and [iv]. innovative approaches to intergenerational and family learning' (ibid.: 29–30). Over the last ten years, the Grundtvig program has supported many projects aimed at promoting active aging and solidarity between generations. The breadth of funded projects is impressive as a recent mapping exercise conducted by Soulsby (2010) identified some 200 initiatives covering a range of learning activities, but mostly, e-learning, intergenerational learning, and older volunteering. The implementation of Grundtvig projects resulted in a number of clear benefits such as recognizing that older adults are valuable human capital, that in the context of population aging lifelong learning is a necessity rather than a luxury, and that both computer and intergenerational learning offer a great potential for active aging. Another benefit includes the mobilization of national senior organizations to involve themselves in policy for late-life learning – hence, 'a

change from a "top-down" to a "bottom-up" approach to policy-making' (Klercq, 2010: 105). Moreover, instead of waiting for policy makers to become aware of issues around education for older adults, funded programs 'prompted initiatives and actions which would put pressure on the policy makers at national and local level to acknowledge the magnitude of the human capital represented by older adults' (ibid.).

## **BEYOND RHETORIC: CRITICAL ISSUES IN EU POLICIES ON OLDER ADULT LEARNING**

The above section confirms how older adult learning has taken on a much higher profile in recent years, as the EU attempted to present a broad and inclusive solution to the challenges arising from the aging of European nations. The key argument, as we have seen, is that the proliferation of learning opportunities for older adults within the wider context of lifelong learning promises to help people adjust to aging-related transitions as well as unravel the idiosyncrasies brought about by an aging workforce. At the same time, however, a critical lens uncovers robust biases in the EU's road-map for late-life learning. The following three sub-sections seek to go beyond the rhetoric of EU policy to highlight its difficulties in establishing truly democratic and transformative practices in older adult learning.

### ***Beyond the rhetoric of activity theory***

EU policy and funding priorities laud late-life learning for its potential to aid older adults remaining active and find new roles following the end of work and independence of children. This is a valid argument as many research studies have substantiated how late-life learning helped him/her to adjust, and at times overcome, the physical, social, and psychological challenges brought on by the onset of later life. However, such a rationale has its

own limitations. One key lacuna consists of its support of an ideological construction of later life where – to paraphrase Mills (1959) – ‘public issues’ are projected as ‘private troubles’. It is unjust to expect older persons to solve the contemporary problems associated with retirement when such issues surfaced only as the result of wider and structural predicaments.

A general disinterest to participate in learning activities on behalf of non-typical learners – that is, working class, men, those living in rural areas, and elders from ethnic minorities – does not suffice as a complete justification for their invisibility in learning programs. For instance, one study on working-class participants’ access to and experience of learning programs found interviewees to be highly motivated to acquire new knowledge (Findsen and McCullough, 2008). It is thus more plausible that certain features of the way elder-learning programs are organized are somehow acting as a barrier to the enrolment of working-class elders whose life situation tends to be characterized by ‘at-risk-of-poverty’ lifestyles (Formosa, 2009). The low percentage of older men signals strongly that opportunities for late-life education are not attractive to them. Primarily, third-age learning activities are promoted in avenues – such as health programs on the broadcasting media or through leaflets at health centres – where most of the clients are women. Secondly, late-life learning tends to be feminized, with Williamson (2000: 63) concluding that ‘in Universities of the Third Age, for example, not only is the membership mostly female, but so are management committees’. As Scott and Wenger (1995) stated, older men tend not to want to become involved with old people’s organizations they perceive to be dominated by women. Thirdly, courses tend to reflect the interests of the dominant female membership. Although no comparative studies on curricula in late-life learning are available, it is noteworthy that Golding and colleagues (2007: 7) note how in Australia ‘adult and community education tends to be underpinned by feminist pedagogies and practice that tends not to encourage or welcome working class masculinities and pedagogies’.

One’s residential location is also an important variable to consider as only a very limited number of learning programs tend to be available in ‘rural’ areas – that is, farms, towns, and small cities located outside urban or metropolitan areas. Research finds that living in rural areas arises as a strong barrier to participation in late-life learners since residents find it difficult to travel to metropolitan areas (Mott, 2008). Whilst many rural elders (especially women) neither own a driving license nor a car, public transport tends to be limited in rural areas. The absence of outreach work on behalf of formal and non-formal education providers means that rural elders are generally left out in the cold, with state subsidies and volunteering activities being disproportionately biased in favour to those living in metropolitan areas. Of course, there have been a number of projects which addressed successfully the problems experienced by older learners in rural communities. For instance, the Department of Continuing Education at Lancaster University operated an innovative *Learning from Home* program that enabled groups of adults, many of whom were older people living in rural areas, to engage in learning through telephone conferencing (Withnall, 2010). Another success story is *Stories of Our Age* – coordinated by the Workers Educational Association Northern Ireland and Age Northern Ireland – and which was aimed at older people living rurally to give them the opportunity of having their voices heard on issues affecting them as they grew older, and to offer them the chance to develop some new skills using digital technology (WEANI, 2011).

### ***Beyond the rhetoric of productive aging***

Another positive aspect of EU policy is a strong commitment to portray aging in a positive light, and especially, highlight the potential of an aging population. In this sense, it provides a welcome respite from traditional policies on social and health care which support the stereotypes of frail elders,

and the view of older persons as dependent members of our population. Learning is treated as a key strategy in bringing unprecedented levels of 'productive aging' – which refers to any activity 'that contributes to producing goods and services or develops the capacity to produce them' (Caro et al., 1993: 6). Such activities 'are socially valued in the sense that, if one individual or group did not perform them, there would be a demand for them to be performed by another individual or group' (Bass and Caro, 2001: 37). The EU's position is admirable as it affirms a cultural ideal, one promoting the idea that older adults can be productive, and hence, counteracting the stereotypes of older adult as 'greedy geezers'.

The problem, however, is that such a commendable rationale is not embedded in a wide range of possible productive lifestyles – ranging from volunteering, informal care, to independent living – but solely in the sphere of paid employment. The assumption is that economic status has the most profound impact on the older adult's ability to experience a meaningful and productive aging experience. Albeit the goals of lifelong learning as premised by the EU also include inclusion, active citizenship, and personal development, nevertheless, the discourse linking learning and later life is biased towards the economic realm. Human experience is surrendered to the controls of the market, so that any notion of meaning detached from 'work' and not defined according to capitalist logic, simply disappears (Estes and Mahakian, 2001). This stance is not surprising considering that from the very beginning the EU (2001) posits the need to expand lifelong education and learning in terms of the competitive advantage that is increasingly dependent on investment in human capital, and on knowledge and competences becoming a powerful engine for economic growth. As Bauman (2005b: 121) states, the task of achieving a 'more inclusive, tolerant, and democratic' society marked by 'greater participation, higher reported well-being and lower criminality'

seems like an afterthought in the EU's documents on lifelong learning, as some kind of natural consequence of a full labour market.

Unfortunately, human capital theory is a key driving point in the EU's vision on lifelong and later learning, as it is assumed that there will be economic payoffs if a society broadens access and opportunities for lifelong learning. Indeed, it is the 'future worker-citizen' rather than the 'democratic-citizen who is the prime asset of the social investment state', so that one locates a strong interdependence between citizenship and employability (Lister, 2003: 433). The position promulgated in EU policy for late-life learning is unashamedly economic, where the solution to the 'aging' problem is put as simply finding a way for older people to be economically useful. Yet, it is noteworthy that there is hardly any evidence to support the usefulness of a strong human capital theory for older persons (Cole, 2000). The increase of opportunities for late-life learning does not result in a surge of older persons going back into either full- or part-time employment, but only a rise in pensioners becoming increasingly active in community and civic engagement affairs. The EU's extensive drive to improve the e-learning skills of older is also problematic. The dominant emphasis towards e-learning that weaves through Grundtvig-funded projects in late-life learning is, ultimately, nothing more than a response to 'skills crisis' in information and communication technology that characterizes older cohorts in European society. As Borg and Mayo (2005) pointed out, the net result of this European hysteria around ICT skills is an increase in public financing of private needs in an area of human resources that is crucial to latter-day capitalism so that private and public interests and concerns are slowly becoming one. Borg and Mayo (ibid.) concluded that 'the memorandum's messages ought to be read against an economic backdrop characterized by a market oriented definition of social viability'.

### ***Beyond the rhetoric of third age learning***

Another limitation of EU policy and Grundtvig funding priorities constitutes their celebration and promotion of third age learning, ultimately at the expense of older and more defenceless people – namely, those in the fourth age. The ‘third age’ refers to a specific socio-demographic trend within population aging. It alludes to how the combination of increased longevity and a number of other social factors – ranging from earlier retirement, improving health status, establishment of the welfare institutions of retirement and pensions schemes, to more positive values and beliefs towards older persons – have opened up what could be loosely termed as a new phase in life, in which significant numbers of older persons spend a considerable amount of time in relative active years following exit from work. The third age thus denotes the emergence of a period of time separating the working years on one hand, and frailty and death on the other (Laslett, 1989). In Weiss and Bass’s (2002: 3) words, the third age is described as a ‘life phase in which there is no longer employment and child-raising to commandeer time, and before morbidity enters to limit activity and mortality brings everything to a close’. On the other hand, the fourth age refers to ‘the age of frailty, dependency and being in need of care’ (MacKinlay, 2006: 12). Indeed, even at a relatively young age, many older adults experience complications from strokes, diabetes, and neurological diseases. Suffice to say that as much as 17 and 23 percent of men and women aged over 65 in the EU experience some level of physical dependence (ECFIN, 2006). The range of cognitive limitations experienced in later life is also substantial with, for instance, 9.95 million older adults suffering from some form of dementia in Europe, a figure that should reach approximately 18.65 million by the year 2050 (Alzheimer Disease International, 2010). Indeed, some 8 percent of persons aged over 65 in the EU resided in long-term care settings in 2004 (ECFIN, 2006).

The rationale underpinning fourth age learning is that dependent older adults still hold varied cognitive needs and interests which can be met through learning opportunities. Aldridge (2009) reports on the UK context which includes programs such as the *Music for Life* program consisting of regular weekly activities including quizzes, puzzles, and games and discussions, and *The Signatures Project* which engages older migrants in an eight-week project to assist them in developing their written signatures and learning to print their names. Other literature documents the potential of reminiscence to aid older persons remember forgotten proficiencies and even develop new skills. Housden (2007), for instance, forwards many examples of learning projects in nursing homes which use learners’ personal memories as a resource in learning, and where residents have gone on to develop skills in forming and sustaining relationships, oral and written communication, as well as engaging in arts, crafts and literacy. Fourth age learning has also been developed with homebound elders, with most programs providing distance learning through radio, television, and especially, online information and communication technology (Gagliardi et al., 2008). Programs providing learning opportunities to older persons at different stages of dementia have also registered varying degrees of success in improving learners’ levels of social and emotional intelligence (ibid.). However, and notwithstanding this rich vein of literature, EU policy on late-life learning overlooks how rising life expectancies warrants new learning needs and interests amongst the oldest and most frail sectors of the older population. It is assumed that only ‘healthy’ older adults are capable of engaging in learning initiatives, and no call is made for governments to reach those persons who due to various physical and/or cognitive challenges are precluded from participating in lifelong learning. Indeed, there seems to be no place for frail elders and carers in EU policy on lifelong learning, and as far as the available literature indicates, no Grundtvig-funded project has yet focused exclusively on the fourth age.

## FUTURE DEVELOPMENTS

The EU must work toward ensuring that access to learning throughout the life course is perceived as a human right, while strongly guaranteeing that adequate learning opportunities in later life becomes a central objective in its policies. There is no doubt that as the time that people in a relatively healthy and independent later life increases, there warrants a public policy which looks at late-life learning beyond just a resource for employment and extending working life. The following broad priorities emerge from the results and discussion reviewed in this chapter.

EU policy on older adult learning is characterized by an unwarranted optimism as far as participation is concerned when it is clear that opportunities to learn are not evenly distributed. Rationales for late-life learning remain incomplete unless they are framed in terms of a discussion of appropriate provision on behalf of the state for both active and excluded elders. This is because irrespective of older persons' interests and yearning for learning opportunities, structural circumstances continue to impact greatly on the extent of participation in older adult learning. For instance, the Grundtvig program is biased by an urge to showcase the potential of the well educated, healthy, and affluent seniors, whilst overlooking the increasing dependency ratios and that as much as 19 percent of persons aged 65 and above in the EU (a total of 16 million) experience at-the-risk-of-poverty lifestyles (Zaidi, 2010). As Parent (2010: 88) emphasized, it is important that Grundtvig 'respond[s] more effectively to the very diverse and evolving needs of older people and the challenges that to many of them posed by financial constraints, social exclusion, lack of basic skills, digital illiteracy, and discrimination'. Whilst ensuring that the freedom of those who choose not to be included is not taken away, policy has the obligation to facilitate the inclusion of persons who, shackled by structural inequalities, are unable to participate in elder-learning. This warrants the drawing of inclusive strategies

that overcome class-, ethnic-, and gender-specific barriers that hinder the realization of a more democratic version of elder-learning practice. Achieving a lifelong learning for all necessitates a widening participation agenda where policy-makers and providers 'think out of the box' to attract older adults who could or would not usually participate in traditional organized provision. This objective will be facilitated if the EU mandates local authorities and voluntary agencies a clearer role in the coordination and lead development of elder learning. Moreover, policies on older adult learning cannot overlook how learning in later life occurs through informal networks. Policy frameworks should advocate those learning aids that facilitate and even initiate informal learning. Hence, There is a need for a structure within which older adults gain insight into themselves as learners. Older adults must be aided to learn how they learn, examine multiple ways to learn, and look for ways to plan their future learning more effectively. In practice, this necessitates elder clubs in libraries, and age-friendly functional literacy and e-learning support.

The EU vision on late-life learning never escapes the greater project to render Europe more competitive in the face of fierce competition from the transitional and multinational corporations' ability to reap the advantages of economies of scale through expansion of international capital mobility. However, aiding older people to remain in paid work represents only one goal amongst others for late-life learning, with other possible objectives being recognizing the diversity of older persons, challenging stereotypes of aging, maximizing social inclusion, maintaining personal independence, and retaining a sense of purpose and meaning. In addition to employment-related programs that support older people moving from full-time employment to various forms of work, higher education must also provide 'personal development' programs which identify new types of courses and markets among a diverse and segmented post-50s market, and 'health and social care' programs

orientated to professionals working with older people that vary from foundation degrees through to modules for continuing professional development (Phillipson and Ogg, 2010). So that the integration of older persons in the labour market becomes a real possibility, policies must break down barriers to labour market entry with active and preventive measures such as job search assistance, guidance and training (Formosa, 2012). Late-life learning should be supplemented by holistic approaches to the needs and wishes of older workers with respect to motivation, and income and social protection issues (*ibid.*). It is hoped that in the foreseeable future EU policy on late-life learning embraces a broader perspective of citizenship, one that includes both political and social rights. However, this goal will certainly not be achieved by any type of learning environment and I join other critical educators (e.g. Finsen, 2007) in stressing the importance of educators and learners to embrace a transformative rationale that enables them to imagine and work together towards the realization of a social world that is governed by life-centred values rather than the ideology of the market. Late-life learning has huge potential to expand the opportunities for 'civic engagement' for those older persons who wish to partake in volunteerism as is generally expected from older generations. Policies on older adult learning should lead learners towards higher rates of political activism, a type of activity that despite being central to citizenship has been delegitimized and is absent from the official policy agenda (Formosa, 2011).

At the same time, EU policy on late-life learning should not overlook the learning needs and interest of frail elders living in the community whose mobility, sight, and/or hearing impairments restricts their mobility. The goal of such programs can range from empowerment to retaining a degree of autonomy, as well as enabling homebound elders to engage in pleasurable and relaxing activities. One possible strategy is to provide adequate transport facilities to and back

from the learning centre. This is feasible if providers pool their resources and provide disability vehicle-careers that are multi-seated. Other possible strategies include enabling homebound elders to participate in learning environments through e-learning strategies or having the learning sessions taking place in learners' homes. Despite widespread scepticism towards the provision of online learning towards homebound elders, participants display great enthusiasm for such programs (Swindell et al., 2011). It is important that homebound elders are provided with the opportunity to engage in self-directed learning through the availability of informative radio/television programmes, mobile libraries, and intergenerational activities such as grandchild-adoption initiatives. The special needs of some elders are also to be given attention. For example, whilst partially sighted elders require publications to be issued in 'clear print', large print and 'raised diagrams', it is also necessary that information is presented in Braille tactile codes and speech-reading computer software. Learning opportunities is also to be made available to informal carers where curricula may range from assertiveness, welfare benefits, self-protection, to social/cultural outings. Of course, providers must also provide respite care while the learning program is taking place, for which funds may be derived from Grundtvig programs. Moreover, there is no doubt that an educational system that spends some 18 years, and substantial financial capital, to prepare citizens for the world of work, but simply a couple of afternoons (if lucky) to leave it, is clearly biased against older persons. Society has an obligation toward its citizens to provide them with learning initiatives that help them plan for their third and fourth ages. However, a really democratic pre-retirement education is not simply instruction about the formalities surrounding pensions, the drawing of wills, and health. It is one which also includes a discussion of psychological and social strategies that lead older adults to improve their quality of life.

It follows that, for lifelong learning to be really 'lifelong', learning opportunities should also be provided to occupants of residential and nursing homes. Although the link between learning and good health is a slippery one and may never be unequivocally resolved, older people who continue to engage in cognitively stimulating activities have been found to be in a better position to adopt strategies assisting them to augment their well-being and independence (Findsen and Formosa, 2011). This warrants that EU policy mandates learning opportunities to be made central to daily life in long-term care settings. As an emergent body of literature strongly demonstrates, the quality of learning participation, processes and outcomes in fourth-age learning is impressive and exceeds all expectations (Housden, 2007; Aldridge, 2009). For example, residential and nursing homes are to provide arts and crafts centres with paid teaching staff, as well as employ an activity and leisure manager who facilitates or runs clubs, discussion groups, reading societies, social/cultural outings, as well as in-house magazine. Residents are to be encouraged to engage in life-history project where they record their past, the present, and most importantly, the future in terms of unfulfilled ambitions, dreams, and aspirations, which they can present to their relatives, friends, and case workers. Interest-groups ranging from choirs, horticulture therapy, reflexology, keep fit, and sports activities, must also be encouraged. Residents experiencing confusion and dementia, together with their carers, are to be engaged in reminiscence activities which focus on the personal manner one experiences and remembers events, and hence, re-living the experiences that are personal in a way that is vivid and engaging. Through such interpersonal relationships residents will have the opportunity to keep on learning that their personhood is still valued, that they are valued, and that they still have some power over their own lives. Following Jarvis (2001), it is beneficial if there was one person in each long-term care setting who is a specialist in helping

create and facilitate learning environments. This position need not necessarily be a separate occupation, but could be a 'specialism learning' by any one from the caring professionals who could be sponsored to read for a post-secondary or tertiary qualification in social gerontology or adult education. Only so will long-term settings be successful in drawing together the seemingly disparate but ultimately overlapping acts of 'learning' and 'caring'.

## CONCLUSION

This critical overview of EU policy and opportunities relating to older adult education argues that the current dominant vision is based more on rhetoric than grounded attempts to establish wider and more democratic practices in elder-learning. While there is no doubt that the EU policy documents and action plans dealing with some aspect of late-life learning are well-intentioned, ultimately they function as nothing more than empty rhetoric that conceal neo-liberal values. As Bauman (2005b: 126 – italics in original) underlines, 'it is not only the *technical skills* that need to be continually refreshed, not only the job-focused education that needs to be lifelong' but 'the same is required, and with greater urgency, by education in *citizenship*'. Whilst the EU's rationale for older adult learning is characterized by a sense of urgency to keep up the rapid 'technological process', no exigency is located 'when it comes to catching up with the impetuous stream of political developments and the fast changing rules of the political game' (ibid.). For instance, despite the EU's dedication of the year 2010 to the combat of social exclusion and poverty, there is still very little research, policy or educational practice relating to vulnerable older persons. Of course, the road towards a successful EU policy and action plan on lifelong and late-life learning is not without obstacles. The hegemonic grip of Third Way politics (Giddens, 1998), which celebrate the human capital model of

development and individuated lifestyles, has led to an almost absence of philosophical reflection on the empowering potential of late-life learning. On a more practical level, one must also admit that public resources may be seriously limited. Such lacunae may be overturned if policy makers shift their focus away from formal 'economistic' avenues of education to informal 'humanistic' contexts of learning – ranging from libraries to social dancing to volunteering – which are so popular with older persons. Here, it is noteworthy to point out Hiemstra's (1976) long-standing finding that the marginalisation of subaltern groups in late-life learning relates to non-participation from education rather than learning per se. Indeed, future EU directives on (older) adult learners would do well to heed his advice that 'educators must learn to remove institutional barriers and recognize that self-directed, independent learning is going on – outside of institutional structures' (ibid.: 337). Such a policy vision, together with accompanying action plans, has immense potential to construct a more holistic approach to late-life learning, one that is sensitive both to the heterogeneous character of older cohorts as well as the diverse meanings that the act of learning has for different persons. In this respect, there is no better way to end this critical commentary than to leave the final word to Withnall (2008: 3) who stressed how lifelong learning policy needs 'a better understanding of the ways in which older people learn, whether and how they differ from those used by younger people and if so, how their learning could be enhanced' on the basis that such a policy direction would bring a more 'inclusive society where all forms of learning are valued, older people are held in higher esteem for the contribution they make, and learning for everyone is truly acknowledged as a desirable lifelong process'.

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