LEARNING IN LATER LIFE IN AN AGEING SOCIETY
Observations and recommendations
for policy makers
from the PEFETE network

Introduction

Grundtvig 4 networks have to fulfill a double function. On the one hand they function as an association of experts from several sides of Europe to feed and support a wider audience of adult educators in different countries. At the other hand the network also functions as a political instrument – transforming her knowledge into recommendations for policy makers: public authorities, the private sector, the civil society and the media.
This policy paper can be seen as the first policy statement build on knowledge from the PEFETE-network.

PEFETE means Pan European Forum for Education for the Elderly and in this network 15 countries are collaborating in the transfer of knowledge, methods and good practice in senior citizens education. When we talk about *education for the elderly* we mostly use other terms to define this type of education, because we do not mean that education and training is only for the oldest people. Therefore we use in this statement as preference terms as *senior education* (for people from 50 – 100 years of age), *senior citizens' education* (emphasizing that we mean education and training not focused on a job, but on active citizenship) or more generally *learning in later life*.

Resources for this policy statement are
- The country reports produced by each of the partners in 2003
- The five partnership meetings in 2004 where educators and trainers from different parts of Europe, involved in learning for later life, got the opportunity to get better ac-quainted with their mutual practice of senior education
- The Dublin workshop in June 2004 where the outcomes of the country reports and the partnership mee-tings have been discussed

For the wider field of adult education these results are more in depth described in the publi-cation *Actual Trends in Senior Citizens´ Education*

Incoherent policy on education and ageing

Europe is an ageing society. While before the enlargement 17% of the population had passed 65, after the enlargement (with 10 new member states) still 16% has passed 65 years of age. This average is the result of a large band weight varying from 12 % in Cyprus up to more than 20% in Germany. However, the process of ageing is not yet finished. Demographical prognoses are expecting the highest level of the ageing process around 2030. Nowadays 20 to 25% of the EU-population has a higher life expectance. This is predicted to rise even up to 33%. So, there is still a long way to go.

For Europe, as an ageing society, the question is relevant what this means for adult learning needs, for the provision and structure of adult education. Here, the financial dimension is crucial. As you may know ± 90% of the European Lifelong Learning budget is spent for

formal learning and ± 10% for non-formal (adult) learning. Informal learning is not financed at all with European money.

The opposite of this financial spenditure can be seen in the participation rate of 65+, in adult learning we see the opposite. Almost 90 % of all senior citizens has been involved in learning activities, mostly in informal learning, but 15% simultaneously also in non-formal and 5% even in formal learning. The conclusion might be that very view of the EU-budget for lifelong learning is spent for senior education.

However, the expectation is that these figures will rise, because there is a positive correlation between the level of initial education and participation in education in later life. So, new generations of senior citizens will be more educated and thus also more willing to participate in learning in later life. This changing demand may have consequences for the priorities in future budgeting.

Most of actual senior citizens' education is not institutionalised, not formal, not vocational and even not functional, although senior citizens often say that education needs to be practical and useful. However this means that most of senior citizens' education is self-directive and experiential learning on informal basis, often within self-organisations. So, in the box without European money.

Although we are talking about senior citizens' education in general, we also have to say that in some parts of Europe senior citizens' education is a rather new area. In fact there are substantial differences between countries and due to the exchange in the PEFETE-network it is a big challenge to explore the tradition in senior citizens' education in those parts of Europe where they already exist longer and to take the profits from earlier experiences.

As said before you have to take into account for future policy that the new generations will be better educated and they will also claim, in later life, more educational provisions in the non-formal as well as in the formal segment.

The demographic figures in combination with the average state of art of educational provisions justify an extra investment in senior citizens' education, but the question is what kind of investment and in what segment of adult education.

Main activities in senior education

Over the last decades a lot of initiatives and actions have taken place in order to establish an attractive offer of educational programmes for senior citizens. But not only an offer of programmes. Some programmes have been set up with the aid of senior citizens themselves. They run the programmes and offer senior citizens an opportunity to be responsible for their education, for the organisation of their education. Many educational programmes have been concerned as to result in the activities of the senior citizens for research work or collaborating with local cultural or service institutions. Many programmes enhance their self-sufficient or their health and lead to a decrease in health expenditure etc. Last but not at least the knowledge and skills that senior citizens gain are passed over to other generations in their families and otherwise. A lot has been done to destroy the stereotypes, which declare senior citizens as passive clients of care services.

We have used the well-known Boston Consultancy Matrix to show the main activities in senior education at Europe.

Good cash cows are:
- Pre-retirement education (NL, DK, IE)
- U3A in interactive self directed way (UK, IE)
- Active old age (UK)
- Older people as experts (NL, UK, DE)
- Studycircles (SL)

These activities are well proved and have had a great popularity. However, they don't exist in all EU-countries. Pre-retirement education is rather new for Austria. There are no real interactive self-directive U3A's in the Benelux countries. Active old age and older people as experts are particular new in Greece, Portugal and Cyprus. Study circles may also have been popular in Norway, Denmark, the Netherlands and the UK, but are not known in Spain.
The cash cows may still be stay a little while, but slowly their popularity will decrease.

Popular rising stars are:
- Languages (Cz)
- Computing (Cz)
- Senior citizens councils (NL, BE, ES)

Foreign languages are particularly popular in the eastern EU-countries, especially English. Computing is popular in all EU-countries and is offered to senior citizens by several kind of organisations – from publicly granted to completely commercialised and everything in between. Training of senior citizens councils are popular in those countries where local politics are seen as the main factor for senior policy.

Hopeful hot dogs might be:
- Senior activities in Chitalista (BG), Kulturhäuser (R), KAPI's (GR)
- University for Older People (I)
- Centres civics/cultural centres (ES), Municipal AE centres (LV)
- Senior clubs - senior associations (NL, LV, CY)

These activities have been started yet and we will see in the coming years if they will succeed or not. Most of them are situated in eastern and south European states. The Dutch senior organisations may be an exception, because these organisations have planned a range of innovative activities, addressed to a younger generation of seniors.

Finally we also distinct some death horses:
- Special folkhighschools (DK)
- Lecture based U3A (several countries)

These activities are really out of date. Lecture based activities are replaced by self directive and interactive activities and special institutes for senior citizens are only acceptable if there is no substitute for it in general education.

Concept of elderly education

At the end of last century an important shift has taken place in the vision on the position and the function of senior citizens in the society. In Nordic and western European countries they are no longer seen as dependent people who needs special care, but as active persons who not only enjoy living, but also play and want to play a role in society.

At a political level older people are more and more considered as ordinary citizens who participate fully in society till on an high age and must have the opportunity to do so. Furthermore, senior citizens are no longer treated as a separate group but as a part of the community. In that view policy for older people must be 'inclusive' but also take into account their specific situation and needs; just like for other groups and generations.

From this point of view education in later life should support this process of change by empowering senior citizens to use and develop their competences and participate in society as long as possible. Without education of senior citizens Europe will be not without harm, faced with a great number of dependent elderly. Between numerous implications the fact of a growing need of adequate education structure is one of the most important. Education of senior citizens is important for the senior citizens themselves enabling them to develop their capacities and for the society as whole. Education gives the senior citizens people the chance to face the rapid changes in the society, on the labour market and in their personal life. Education enables them to participate in complex democratic societies on all levels, in community in national and European contexts. And education of senior citizens gives the society a chance to pursue its social and economic development supported by socially integrated elderly.

In that light it is astonishing that up till now – even in the Nordic and western countries - hardly budgets are available for lifelong learning for older citizens.

Mostly senior education is embedded in general adult education and just as in Ireland it is hidden in principles as social cohesion, inclusion and integration:
   a) *A systemic approach* – requiring that '..educational policies must be designed to embrace the life cycle, reflect the multiplicity of sites, both formal and informal, in which learning can take place, provide for appropriate supports such as guidance, counseling and childcare, and for mechanisms to assess learning..'
   b) *Equality* of access, participation and outcome for participants in adult education, with strategies to counteract barriers arising from differences of socio-economic status, gender, ethnicity and disability
   c) *Inter-cultureless* - 'the need to frame educational policy and practice in the context of serving a diverse population as opposed to a uniform one, and the development of curricula, materials, training and in-service, modes of assessment and delivery methods, which accept such diversity as the norm. This refers not only to combating racism and encouraging participation of immigrants, refugees and asylum seekers in education, but also to a recognition that any minority groups such as travellers, people with disabilities, older adults, participants in disadvantaged areas may have distinctive needs and cultural patterns which must be respected and reflected in an education context. It also envisages a more active role by adult educators in the

promotion of the Irish language and culture.' (the Irish White Paper on Adult Education)

These principles illustrate the ethos of inclusiveness that underpins current policy thinking in the adult education sector.

Nowadays in the western and Nordic states competence development mainly predominates in the case of formal provision, instruments for the validation of non-formal and informal learning developed in the context of lifelong learning and employability. Initial education is no longer enough for the whole of an individual's working life and European citizenship. The acquisition of knowledge is becoming less important – it is now more a matter of developing competences. Competences can be developed through formal learning processes. However, competence-development also takes place through informal learning while working, in domestic and voluntary work and through hobbies. If these competences can be compared with formal qualifications then it should be possible to recognise them as valid. Formal recognition of individual competences has a positive impact on individuals, at organisation or sector level and at national or qualification level. For senior citizens in the future it will be the bridge between working and learning and perhaps even the single most important instrument for guidance through the knowledge-based society.

In the Mediterranean states liberal adult education is still particularly young. Many people have lived for years under dictatorial regimes whose interest in education was only to create wide support for their politics: the experience of learning in freedom, independent education was impossible. Many people have the idea that they are still recovering the liberal principles of education in general. They don't need to be empowered, because they know already that education will give you more power. In the Mediterranean states adult education is not yet structured, and adult educators are still focused on the intern dynamics of educational processes. Education is primarily seen a social process strongly linked with social participation – being part of the community, contributing to the community.
However, there is a tension between the increasing level of education and the negative employment rates. More and more it seems to be that even if you update your knowledge and skills the best you can, you are already behind the times again. This effect relatives the impact of education and people are loosing their faith in lifelong learning.

The eastern countries are still struggling with a generation of high educated senior citizens who had to leave the labour process earlier than expected and who see themselves also faced with lower pensions as in the western part of Europe. In former days state education was a very important portal to society, also in ideological and emotional way. Employment had been guaranteed. Nowadays the situation is totally different and people like entrepreneurship and employability to be successful. Therefore, social participation and integration seems to be the most important aspects of senior education, but there is a lack on political priority for it. However, the impact of liberal adult education is also not so directly connected with promotion in society. And because people are aware of this sometimes there is a tendency to participate less in education then possible. Promotion campaigns for education from the government are suspicious and less effective.

In all parts of Europe empowerment, competence development, social participation and integration seems to be more ideas than practice in senior citizens education.

However, for senior education projects are set up from these principles - sometimes influenced by experiences in the western and Nordic parts of Europe - and developments are founded on it. Thus more seniors are successfully involved as a helper in the educational processes. Volunteers and home carers are educationally supported. And local authorities support intergenerational projects and techniques of reminiscence are used in neighbourhood work.

However, the most important developments in senior education are: the recognition of the significance of informal learning for older people and especially for the increasing group of the very old; the recognition of the value of the combination of education and community development, and also of the meaningful involvement of older citizens as helpers in the learning process.

The leading idea in ageing policy becomes more and more that the best thing one can do is to reinforce the autonomy of older people and help them to remain active as long as possible and to support their contribution to the development of society. On the basis of these considerations the government stimulates older adults to work longer and older people to volunteer. However a lot of structural barriers still exist. In care-policy, as mentioned, the emphasis moves from residential care to homecare, self-care and prevention. This change lies in line with the new concept of age and ageing (the "competence model").

Education seems a good in itself and no questions are posed by the relevance of it for the person and the community. The number of people enrolled seems the only criterion for success. How much and which older citizens participates is not registered and either in which activities they take part. But everybody knows that the better educated profit the most from the traditional offer. A consequence of this approach is that the problem of basic education for older citizens is not raised.

Diversity in adult education throughout Europe

It is interesting to look at the differences between these developments in the north, the west, the south and the east of Europe: in the north new initiatives are embedded and sometimes renewed in the fine-mazed social welfare structure. In the western part new initiatives are strongly based on new partnerships between social organisations, local authorities and enterprises replacing old systems of social welfare. In the south we see an interesting mix between family based learning and social volunteering and a growing interest from local communities. In the eastern part we see new developments in establishing new forms of non-formal education related to democratic participation structures. The challenge is to learn from each other to avoid an unhealthy doses of overprotection, to enlarge the empowerment of older people as much as possible, to set up new partnerships and alliances and to develop attractive and democratic infrastructures for participation in society.

Studying the country reports we noticed a strong correlation between national tradition in adult education and the education rate of the population.

We see Denmark, Germany, Ireland, Belgium, Netherlands, and UK as countries with a strong tradition in adult education. Although many differences in the relation between education and social policy in all these countries, there is a consistent awareness of the social function of education in society. There may be different opinions about the degree in which adult education might be financially supported by the authorities. However, there is no doubt about the meaning of adult education and lifelong learning. This is also reflected in the attitude towards senior education: it is expected to play a positive role. Lifelong learning is seen, as a confirmation in the strong believes in education.

We distinct two categories of countries with a weak tradition in adult education.
On the one hand the former communist countries as Latvia, Bulgaria, Romania, Czech Republic and Slovenia: in these countries is a lot of doubt about the central role and influence of education, due to the connection between education and politics in the past. Education is negatively infected by the state ideology. In these context it is looking for a way to build up a more liberal and dynamic kind of education in a much more flexible and not bureaucratic infrastructure and in a very cost effective way. In these countries lifelong learning is seen on the best as an opportunity, more than as a challenge. Many people wait and see. Particularly older citizens who know painfully that what they have lost might be more than what they still can win in future.
At the other hand there are the Mediterranean countries as Italy, Spain, Greece and Cyprus, which have another kind of weakness in adult education: adult learning is often very much integrated in daily life, but not explicitly. The distinction between learning and action is maybe nowhere so small and vague as in the Mediterranean. Adult learning is full of joy, energy and passion, but very low structured and less institutionalised. Adult education here is embedded in the hearts of the people but not in politics, not in policy, and not explicitly in official structures. Lifelong learning here is absolutely a challenge, but it can only be realised if it will be funded more in the policy and structures of the countries.

These geographical contexts of adult education are relevant if we want to get an idea about what the European exchange of ideas and practices can mean and how we can learn from each other and how we can used this to improve our quality of living. There is no copier able to do this and it is also not a matter of social technology.

Separate from this historical and cultural context we can study also the education rates in the different countries. The lowest final degrees in education of the actual older generations are found in countries as Ireland, Belgium, Netherlands, UK, Italy, Spain, Greece and Cyprus. In countries as Denmark, Germany, Latvia, Bulgaria, Romania, Czech Republic, Slovenia senior citizens have generally a higher degree in education.

When we take this in account we can formulate different questions and challenges to different clusters of countries.

For Italy, Spain, Greece and Cyprus:
- How can non-formal adult education be stronger connected with the practice of social learning?
- What kind of structure and policy is needed to facilitate and support these learning processes?

- What role can senior citizens play in this processes of renewal and improvement?

For Latvia, Bulgaria, Romania, Czech Republic, Slovenia:
- What can non-formal adult learning add to quality of life?
- What are the benefits of social participation of senior citizens without perspectives on work and better income?
- What makes life challenging and meaning full?

For Ireland, Belgium, Netherlands, UK:
- How to enforce the process of valuing non-formal learning and training experiences?
- How to transform the renewed self-esteem and self-confidence of senior citizens into social participation and integration?
- How to incorporate senior education in the educational infrastructures?

For Denmark and Germany:
- How to improve the procedures of valuing prior learning?
- What credits can be based on participating in non-formal adult learning and social work? How you can use successful roles of senior citizens as a model?
- How to implement such a credit point system systematically in education?

Strengths and Weaknesses versus Opportunities and Threats

We have analysed the main activities in the field of senior education in several ways.

As *strengths* we have identified:

Self-directed and experiential learning:
> The personal involvement of senior citizens, their (life) experience and the necessity to move them forward is a guarantee for an intensive and engaged process

Large resource of volunteers:
Many of the activities are counselled from peers to peers; in this way many people are involved on a voluntary basis and act alternately as participant and as helper in the learning process; this stake of volunteers is a good foundation for further social participation

Contribution to cultural heritage and human capital:
The output of the learning processes are often contributing strongly to a personalising of cultural heritage and it emphasizes the relevance of senior citizens as human capital.

Wide gamma of providers:
This type of learning activities can be easily organised by several providers, in mutual collaboration, or in strong competition with each other.

Large resource of life experience:
These activities include a very various and rich number of life experiences; it can be interesting to conserve these, to analyse these and to transform these into time documents.

As *weaknesses* we had to identify:

Less documentation of good practice:
As many projects in informal learning there are less descriptions of the learning processes, the impact and the output, this makes these activities often seen as rather 'soft'.

Lack of professional support:
A big problem is that many of these activities have less professional support; this makes that descriptions of good practices, guidelines for good practice and other dissemination cannot be produced.

Lack of collaboration with other resources:
The people involved in these activities often miss the necessary networks and contacts to strengthen and enforce their projects.

We see also a range of *opportunities*:

Demographic changes:

The actual projects are predecessors of a wider gamma of activities that will be necessary due to the ageing society

Learning managing changes:
The content of the learning processes of senior citizens can show us how to manage life changes

Bottom-up approach EU-collaboration by networking & exchange:
The method of networking and exchange, used in the PEFETE-network, contributes to further EU-collaboration based on signals from grass root level.

Using existing social infrastructures:
The PEFETE-approach stimulates to make creatively use of existing social infrastructures, although this will result different solutions in geographical way.

Using transnational partnerships:
Transnational partnerships like in PEFETE are very helpful for mutual support in different situations.

Links to other networks:
Using different networks can enforce dissemination of good practice

However, we also see serious *threats*:

Structural ageism:
One of the threats is that all European countries are struggling with a deep and serious structural ageism that has incorporated society in many aspects. Due to this proposals for educational senior projects will not be welcomed and supported automatically. The other side of the coin is that serious proposals, which take into account how to keep senior citizens integrated in society, will have more chance.

One dimensional focus on vocational training:
Another problem is that the one dimensional focus on vocal training, which nowadays predominates education policies in many EU-member states, is not stimulating educational projects for senior citizens who are often finished on the labour market. More emphasis on the important role that non-formal education can play a role in stimulating active citizenship is needed to tackle this problem.

Lack of social infrastructure:
Senior citizens education can only be successful when it is embedded in a well functioning social infrastructure; in some countries senior citizens education first have to contribute in building up such infrastructures before they can be effective; this requires special attention, not too high run expectations, patience and perseverance.

National priorities in LLL and ageing:

Senior citizen education also needs a permanent lobby from senior self-organisations and adult education organisations to be one of the national priorities in the lifelong learning agenda; without this permanent attention positive attitudes quickly can change in negligence.

Budget cuts:
Senior education projects are often in danger for budget cuts due to the economic and financial situation of authorities; this problem can be tackled by getting support and sponsorships from other institutes in society – the stake of volunteers to organise and council these activities may be a good front piece.

Lack of local support from local authorities:
Senior education projects need financial support, but sometimes it can be more important to have political support from local authorities than financial. Training for project coordinators should emphasize this aspect more than usual.

Recommendations for further EU policy

1. *Learning in later life* and/or *ageing society and education* should be one of the annual priorities in the Socrates call for proposals, but also in other programs like Comenius (senior citizen's as helpers in learning processes at school), Leonardo, etc. This may have a positive effect on specific project proposals. Also *active citizenship* particularly focused on the role of senior citizens may be widely promoted.
   This can be strengthened by organising contact seminars for candidate project coordinators on one of these issues. Partners in PEFETE will be happy to join these meetings and to disseminate their knowledge and ideas about this growing field of interest.

2. The future programmes for Education and Training 2010 need more financial balance between formal and non-formal adult education. Particularly education and training for European active citizenship should be more acknowledged, more prioritised and more facilitated. The enlargement of the EU justifies this and this heading will make it easier to forward project applications for senior citizens' education as well.

3. National governments can be asked to take into account in their calculations where the national break even point will be that a more well-educated generation of senior citizens will enter the market of adult education, and should stimulates adult education organisations to anticipate on this moment.

4. A suggestion may also be to reserve yearly a part of the Grundtvig project budget for projects focused on one of these issues. PEFETE will welcome new initiatives and is happy to help them with information, support, implementation and dissemination.

5. New European projects focused on senior citizens' education should be based on an exploration of learner needs, should anticipate on the demands of a new and more educated generation of senior citizens and should pay attention to the consequences for special target groups like ethnic minorities, frail elderly, etc.

6. New European projects in senior citizens' education should either implement and disseminate various good practices mentioned as cash cows and rising stars in the Boston Consultancy Group Matrix (pg. 3) or either focus on (re) building social infrastructures including provision for senior citizens (compare with the hot dogs on pg. 3)

7. New European projects focused on training of senior citizens in an active role in (re) building social infrastructure and promoting active and democratic citizenship should be welcomed especially when they are situated in east European states. The dissemination task of these project should be clearly defined as transferring good models of capacity building for social infrastructures to other countries.

8. New European projects focused on social learning of senior citizens in combination with training for social participation should preferably be piloted in south European countries to improve and strengthen the learning culture. The dissemination task of these project should be clearly defined as improving the quality and effectiveness of non-formal learning.

9. New European projects for senior citizens focused on valuing prior learning should be preferably piloted in west and north European countries, because these countries have the best conditions to measure the effects of such interventions. The dissemination task of these project should be clearly defined as transferring good practice of valuing prior learning to other countries.

10. New European projects for learning in later life should be based on empowerment, social participation, integration and competence development. Further on it is strongly recommended that senior citizens are involved and represented in organising these projects.

11. Due to the diversity in adult and senior education, stimulating mobility programmes for senior citizens would be very helpful to explore this diversity and to use this knowledge to get the best out of it. Europe is no final situation, Europe means development and it will support European citizenship to make senior citizens sharing in this development.

12. Special attention should be paid on how project coordinators try to overcome internal weaknesses and external threats – this could be a good issue for Grundtvig project coordinator meetings.

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