

Lifelong Learning Book Series 22

Brian Findsen
Marvin Formosa *Editors*

International Perspectives on Older Adult Education

Research, Policies and Practice

 Springer

Lifelong Learning Book Series

Volume 22

Series Editors

David N. Aspin, *Faculty of Education, Monash University, Melbourne, Australia*

Judith D. Chapman, *Centre for Lifelong Learning, Australian Catholic University, Melbourne, Australia*

Editorial Board

William L. Boyd, *Department of Education Policy Studies, Pennsylvania State University, University Park, PA, USA*

Karen Evans, *Institute of Education, University of London, UK*

Malcolm Skilbeck, *Drysdale, Victoria, Australia*

Yukiko Sawano, *University of the Sacred Heart, Tokyo, Japan*

Kaoru Okamoto, *National Graduate Institute for Policy Studies, Tokyo, Japan*

Denis W. Ralph, *Flinders University, Adelaide, Australia*

Aims & Scope

“Lifelong Learning” has become a central theme in education and community development. Both international and national agencies, governments and educational institutions have adopted the idea of lifelong learning as a major theme in the coming years. They realize that it is only by getting people committed to the idea of education both life-wide and lifelong that the goals of economic advancement, social emancipation and personal growth will be attained.

The *Lifelong Learning Book Series* aims to keep scholars and professionals informed about and abreast of current developments and to advance research and scholarship in the domain of Lifelong Learning. It further aims to provide learning and teaching materials, serve as a forum for scholarly and professional debate and offer a rich fund of resources for researchers, policy-makers, scholars, professionals and practitioners in the field.

The volumes in this international Series are multi-disciplinary in orientation, polymathic in origin, range and reach, and variegated in range and complexity. They are written by researchers, professionals and practitioners working widely across the international arena in lifelong learning and are orientated towards policy improvement and educational betterment throughout the life cycle.

More information about this series at <http://www.springer.com/series/6227>

Brian Findsen • Marvin Formosa
Editors

International Perspectives on Older Adult Education

Research, Policies and Practice

 Springer

Editors

Brian Findsen
Te Whiringa School of Educational
Leadership & Policy
Faculty of Education
University of Waikato
Hamilton, New Zealand

Marvin Formosa
Department of Gerontology
Faculty for Social Wellbeing
University of Malta
Msida, Malta

Lifelong Learning Book Series

ISBN 978-3-319-24937-7

ISBN 978-3-319-24939-1 (eBook)

DOI 10.1007/978-3-319-24939-1

Library of Congress Control Number: 2015960272

Springer Cham Heidelberg New York Dordrecht London

© Springer International Publishing Switzerland 2016

This work is subject to copyright. All rights are reserved by the Publisher, whether the whole or part of the material is concerned, specifically the rights of translation, reprinting, reuse of illustrations, recitation, broadcasting, reproduction on microfilms or in any other physical way, and transmission or information storage and retrieval, electronic adaptation, computer software, or by similar or dissimilar methodology now known or hereafter developed.

The use of general descriptive names, registered names, trademarks, service marks, etc. in this publication does not imply, even in the absence of a specific statement, that such names are exempt from the relevant protective laws and regulations and therefore free for general use.

The publisher, the authors and the editors are safe to assume that the advice and information in this book are believed to be true and accurate at the date of publication. Neither the publisher nor the authors or the editors give a warranty, express or implied, with respect to the material contained herein or for any errors or omissions that may have been made.

Printed on acid-free paper

Springer International Publishing AG Switzerland is part of Springer Science+Business Media (www.springer.com)

Foreword

Lifelong Learning Includes Older People!

For the past 4 years, there have been intense debates about what international community should identify as global development priorities, following the Millennium Development Goals and Education For All (EFA). There is widespread agreement that ‘no one should be left behind’ and that poverty should be eradicated. There is, too, a consensus that the global education goal post 2015 should include a commitment to lifelong learning – though there are significant differences between the Global EFA Meeting’s commitment to ‘ensuring equitable and inclusive quality lifelong learning for all by 2030’, whilst the Open Working Group of UN member states called only for the promotion of ‘lifelong learning opportunities for all’.

At first sight this should augur well for the world’s rapidly growing numbers of older people, but as chapter after chapter in this welcome international review of provision for older adults makes clear, there is a gap between the rhetoric of international agreements and the practice on the ground. A few of the countries covered in the study identify the learning needs of older adults as a priority for state action. Where there is a variety of provision, it is characteristically developed by civil society organisations, sometimes backed by state finance. Krasovec and Krump observe in their contribution to this collection that such state support in Slovenia is ‘modestly financed, and therefore loosely supervised and superficially evaluated’, and the picture they identify is not unique to Slovenia.

This lightness of oversight and regulation has both positive and negative effects. On the one hand, as the studies here testify, there is a rich range of imaginative and innovative practice organised by learners for learners or by adult education organisations – ranging from the success of Universities of the Third Age, men’s sheds movements, the Indonesian Silver Colleges or the Maori Kaumatua elders’ programmes. There is, too, a significant growth in distance and online learning – from Hong Kong’s Radio College for Elders, to the growth of Mass Online Open Courses with global audiences or the online expert patient communities.

On the other hand in education, just like in health and life-expectancy, the poorest adults, those in rural communities and migrant groups, participate at dramatically lower rates than the affluent and those with extended initial education. However, there is nothing inevitable about this. I worked in the 1980s as a Principal in the Inner London Education Authority, which had a policy of charging just £1 for a year for older people to study as many classes as they wanted. 35 % of London 60+ population participated each year – doubtless many coming initially to keep warm, but staying to take an extraordinarily wide range of studies.

ILEA was, alas, closed, along with its older people's programmes, an early victim of national neo-liberal education policies. There is no shortage of neo-liberal policies which prioritise a narrow utilitarianism, focused on labour market needs now. Even when older people's needs are given government priority, as in the impressive South African literacy programme, Kha Ri Gude, it is justified because so many older people have head of family responsibilities in the wake of the HIV/AIDS pandemic. There is little space in public policy for the realisation of the vision outlined in the Delors report for UNESCO, *The Treasure Within*, which identified four pillars of learning – learning to know, learning to do, learning to be and learning to live together. For older people, it is the last two of these pillars that are the principal focus of learning. As Chui and Zao put it in their chapter, 'The main objective for adult learning is to discover the meaning of experience,' and in the English study of what people learn at different ages we found a significant shift away from vocational concerns from the mid-forties, as older adults took up courses in history, philosophy and religion.

That adults have different priorities at different stages of the life-course is a central tenet of Schuller and Watson's *Learning Through Life*. They argue, albeit in an industrial country context, that there are distinct learning priorities for older adults, roughly 50–75, discovering new roles and a differing balance between work, caring and personal development between broadly 50 and 75, and the distinct needs of older adults, who adjust to more sedentary lives, and to the changing demands of the latest phases of their lives. They also point to the difficulty in making the case for learning to policy makers given the dearth of statistical evidence, and call for surveys of learning to extend beyond the 64-year-old cut-off point common in OECD countries' statistics.

One of the key challenges adult education services face is that they are, on the one hand, modest services at the margins of the institutions or education services, easily overlooked by the large scale needs of primary and secondary schools or of universities; but they are at the same time catalysts for the achievement of development goals across the board. Nowhere is this more true than in considering the welfare of older people. As the UK Foresight study, *Mental Capital and Well-being* concluded, good mental health relies on connecting with others, being active, keeping on learning, fostering curiosity and being generous – all attributes central to the goals of the U3A movement, and of many other initiatives in older people's learning. The global aspirations to end female genital mutilation, to secure clean water and sanitation, to reduce maternal mortality, to secure sustainable development and

to foster global citizenship all rely on young and especially older adults learning, in order to understand, adapt to and to shape the changes that are sought.

As industrial countries face major increases in the size of their older, and very old populations, and longevity increases rapidly in developing countries, too, public policy will increasingly focus on the needs of older people, and organisations like the International Council for the Education of Adults will highlight the positive effects across the spectrum of investing in learning, and making that case will be easier with the evidence contained in this collection of country studies. We must hope that as that case is recognised policy makers will come to understand what so many older learners across the world recognise – that, important though it is, there is more to education and to learning than economic productivity. There is joy and laughter, storytelling, singing and conviviality, debate and dreaming: all tools for a life worth living.

University of Wolverhampton, Wolverhampton, UK
International Council for Adult Education, Leicester, UK

Alan Tuckett

Bibliography

- Aldridge, F., & Tuckett, A. (2008). *What older people learn*. Leicester: NIACE.
- Delors, J., et al. (1996). *The treasure within*. Paris: UNESCO.
- Schuller, T., & Watson, D. (2009). *Learning through life*. Leicester: NIACE.
- UK Government Office for Science. (2008). *Foresight mental capital and wellbeing project final project report executive summary*. London: Government Office for Science.
- UNESCO '2014 GEM Final Statement: The Muscat Agreement'. www.uis.unesco.org/Education/Documents/muscat-agreement-2014.pdf. Accessed 29 Jan 2015.
- UN Open Working Group proposal for sustainable development goals. <https://sustainabledevelopment.un.org/focussdgs.html>. Accessed 26 Jan 2015.

Acknowledgements

We would like to thank all the contributors to this book who provided excellent expositions of the situation of older adult learning/education in their respective countries. Needless to say, without their prompt and empathetic responses, this book would have remained unfulfilled. We are especially grateful to Professor Alan Tuckett, formerly Director of the National Institute of Adult Continuing Education (England and Wales) and formerly President of the International Council of Adult Education, for his critical insights into learning in later life in the Foreword. Our colleagues, many of whom are authors in this book, and our students have helped provide impetus for this edited volume. We are also grateful to Springer and the staff who worked so co-operatively towards the professional production of the book. Finally, thanks also go to our respective partners, Caterina and Fiona, who throughout the past 24 months provided consistent support and encouragement to this book's editorial challenges.

Contents

1	Introduction	1
	Brian Findsen and Marvin Formosa	
2	Argentina	11
	José Alberto Yuni and Claudio Ariel Urbano	
3	Australia	25
	Barry Golding and Helen Kimberley	
4	Austria	35
	Franz Kolland and Anna Wanka	
5	Botswana	47
	Rebecca Lekoko	
6	Brazil	59
	Meire Cachioni, Mônica de Ávila Todaro, Tiago Nascimento Ordonez, and Thaís Bento Lima da Silva	
7	Canada	75
	Pat Spadafora and Lia E. Tsotsos	
8	Chile	87
	Pedro Paulo Marín Larraín, Macarena Rojas Gutiérrez, Francisca Campos Torrealba, and Javiera Sanhueza Chamorro	
9	Mainland China	99
	Xinyi Zhao and Ernest Chui	
10	Colombia	111
	Miguel Alberto González González	
11	France	121
	Dominique Kern	

12	Germany	133
	Bernhard Schmidt-Hertha	
13	Ghana	145
	Michael Tagoe	
14	Greece and Cyprus	157
	George K. Zarifis	
15	Hong Kong	169
	Ernest Chui and Xinyi Zhao	
16	India	179
	Ilango Ponnuswami, Sonny Jose, and Praveen Varghese Thomas	
17	Indonesia	189
	Clara M. Kusharto and Nugroho Abikusno	
18	Italy	201
	Elena Luppi	
19	Japan	211
	Shigeo Hori	
20	Kenya	221
	Florida Amakobe Karani and David Macharia	
21	Lesotho	235
	Julia Preece and David Croome	
22	Malaysia	247
	Rahimah Binti Ibrahim, Tengku Aizan Hamid, Sen Tyng Chai, and Siti Farra Zillah Abdullah	
23	Malta	261
	Marvin Formosa	
24	Namibia	273
	Miriam Hamunyela and Haaveshe Nekongo-Nielsen	
25	Netherlands	285
	Jumbo Klercq	
26	New Zealand	297
	Brian Findsen	
27	Nigeria	309
	Michael Omolewa	
28	Nordic Countries	321
	Tarja Tikkanen	

29 Peru	333
Blanca López La Vera	
30 Portugal	345
Paula Guimarães and Fátima Antunes	
31 Republic of Korea	357
Youngwha Kee and Yunji Kim	
32 Russian Federation	367
Olga Agapova	
33 Singapore	379
Kalyani K. Mehta	
34 Slovenia	389
Sabina Jelenc Krašovec and Sonja Kump	
35 South Africa	399
John Aitchison and Peter Rule	
36 Spain	411
Mariano Sánchez-Martínez and Juan Sáez	
37 Taiwan	421
Yi-Yin Lin and Chin-Shan Huang	
38 Tanzania	433
Philemon A.K. Mushi	
39 Turkey	445
Suzan Yazici and Nilufer Korkmaz Yaylagul	
40 Uganda	457
George Ladaah Openjuru	
41 United Kingdom	467
Alexandra Withnall	
42 United States	481
Ronald J. Manheimer	
43 Zimbabwe	495
Stanley Mpofo	
44 Concluding Remarks	507
Brian Findsen and Marvin Formosa	

Contributors

Siti Farra Zillah Abdullah Institute of Gerontology, Universiti Putra Malaysia, Serdang, Malaysia

Nugroho Abikusno Medical Faculty, InResAge Trisakti University, Jakarta, Indonesia

Olga Agapova St.Petersburg, Russia

John Aitchison Centre for Adult Education, University of KwaZulu-Natal, Pietermaritzburg, South Africa

Fátima Antunes Centre of Research on Education, University of Minho, Braga, Portugal

Meire Cachioni Graduate Program in Gerontology, University of São Paulo, São Paulo, Brazil

Juan Sáez Department of Theory and History of Education, University of Murcia, Murcia, Spain

Javiera Sanhueza Chamorro Programa Adulto Mayor, Pontificia Universidad Católica de Chile, Santiago, Chile

Ernest Chui Department of Social Work and Social Administration, The University of Hong Kong, Hong Kong, China

David Croome National University of Lesotho, Rome, Lesotho

Mônica de Ávila Todaro Graduate Program in Gerontology, University of São Paulo, São Paulo, Brazil

Thaís Bento Lima da Silva Faculty of Medicine, University of São Paulo, São Paulo, Brazil

Brian Findsen Te Whiringa School of Educational Leadership & Policy, Faculty of Education, University of Waikato, Hamilton, New Zealand

Marvin Formosa Department of Gerontology, Faculty for Social Wellbeing, University of Malta, Msida, MSD, Malta

Barry Golding Faculty of Education and Arts, Federation University Australia, Ballarat, VIC, Australia

Miguel Alberto González González Universidad de Manizales, Manizales, Colombia

Paula Guimarães Instituto de Educação, Universidade de Lisboa, Lisbon, Portugal

Macarena Rojas Gutiérrez Programa Adulto Mayor, Pontificia Universidad Católica de Chile, Santiago, Chile

Tengku Aizan Hamid Institute of Gerontology, Universiti Putra Malaysia, Serdang, Malaysia

Faculty of Human Ecology, Universiti Putra Malaysia, Serdang, Malaysia

Miriam Hamunyela Department of Lifelong Learning and Community Education, University of Namibia, Windhoek, Namibia

Shigeo Hori Department of Education, Osaka University of Education, Osaka, Japan

Chin-Shan Huang Department of Adult and Continuing Education, National Chung Cheng University, Chia-Yi, Taiwan

Rahimah Binti Ibrahim Institute of Gerontology, Universiti Putra Malaysia, Serdang, Malaysia

Faculty of Human Ecology, Universiti Putra Malaysia, Serdang, Malaysia

Sonny Jose Loyola College of Social Sciences, University of Kerala, Thiruvananthapuram, India

Faculty of Human Ecology, Universiti Putra Malaysia, Serdang, Malaysia

Florida Amakobe Karani Department of Educational Studies, University of Nairobi, Nairobi, Kenya

Youngwha Kee Department of Lifelong Education, Soongsil University, Seoul, South Korea

Dominique Kern Department of Education – Faculty of Arts, Languages and Humanities, University of Haute Alsace, Mulhouse/Alsace, France

Yunji Kim Department of City and Regional Planning, Cornell University, Ithaca, NY, USA

Helen Kimberley Research and Policy Centre, Brotherhood of St Laurence, Melbourne, VIC, Australia

School of Social and Political Science, University of Melbourne, Melbourne, VIC, Australia

- Jumbo Klercq** The Elephant Learning in Diversity, Nijmegen, The Netherlands
- Franz Kolland** Department of Sociology, University of Vienna, Vienna, Austria
- Sabina Jelenc Krašovec** Department of Educational Sciences, Faculty of Arts, University of Ljubljana, Ljubljana, Slovenia
- Sonja Kump** Department of Educational Sciences, Faculty of Arts, University of Ljubljana, Ljubljana, Slovenia
- Clara M. Kusharto** Department of Community Nutrition, Faculty of Human Ecology, Bogor Agricultural University, Bogor, West Java, Indonesia
- Blanca López La Vera** Departamento de Comunicaciones, Facultad de Ciencias y Artes de la Comunicación, Pontificia Universidad Católica del Perú, Lima, Peru
- Pedro Paulo Marín Larraín** Departamento de Medicina Interna-Geriatria, Facultad de Medicina, Pontificia Universidad Católica de Chile, Santiago, Chile
- Rebecca Lekoko** Department of Adult Education, University of Botswana, Gaborone, Botswana
- Yi-Yin Lin** Gerontology Institute, Georgia State University, Atlanta, GA, USA
- Elena Luppi** Department of Education Studies, University of Bologna, Bologna, Italy
- David Macharia** Department of Distance Studies, University of Nairobi, Nairobi, Kenya
- Ronald J. Manheimer** NC Center for Creative Retirement (now Osher Lifelong Learning Institute), University of North Carolina, Asheville, NC, USA
- Mariano Sánchez Martínez** Department of Sociology, University of Granada, Granada, Spain
- Kalyani K. Mehta** Gerontology Programme, SIM University, Singapore, Singapore
- Stanley Mpfu** Centre for Continuing Education, National University of Science & Technology, Bulawayo, Zimbabwe
- Philemon A.K. Mushi** Educational Foundations Management and Lifelong Learning, University of Dar es salaam, Dar es salaam, Tanzania
- Haaveshe Nekongo-Nielsen** Department of Student Support, Centre for External Studies, University of Namibia, Windhoek, Namibia
- Michael Omolewa** University of Ibadan, Ibadan, Nigeria
- George Ladaah Openjuru** Faculty of Education and Humanities, Gulu University, Gulu, Uganda
- Tiago Nascimento Ordonez** Brazilian Association of Gerontology, São Paulo, Brazil

Ilango Ponnuswami Department of Social Work, Bharathidasan University, Tiruchirappalli, India

Julia Preece Adult and Community Education, Durban University of Technology, Pietermaritzburg, South Africa

Peter Rule Centre for Adult Education, University of KwaZulu-Natal, Pietermaritzburg, South Africa

Bernhard Schmidt-Hertha Institute of Education, University of Tuebingen, Tuebingen, Germany

Pat Spadafora Sheridan Centre for Elder Research, Sheridan College, Oakville, ON, Canada

Michael Tagoe School of Continuing and Distance Education, University of Ghana, Legon, Ghana

Praveen Varghese Thomas Loyola College of Social Sciences, University of Kerala, Thiruvananthapuram, India

Tarja Tikkanen Centre for Learning Environment, University of Stavanger, and Faculty of Teacher and Cultural Education, Stord/Haugesund University College, Haugesund, Norway

Francisca Campos Torrealba Programa Adulto Mayor, Pontificia Universidad Católica de Chile, Santiago, Chile

Lia E. Tsotsos Sheridan Centre for Elder Research, Sheridan College, Oakville, ON, Canada

Sen Tyng Chai Institute of Gerontology, Universiti Putra Malaysia, Serdang, Malaysia

Claudio Ariel Urbano CITCA-CONICET (National Council of Scientific and Technological Research), Sciences Education Department, Faculty of Humanities, National University of Catamarca, Catamarca, Argentina

Anna Wanka Department of Sociology, University of Vienna, Vienna, Austria

Alexandra Withnall Centre for Lifelong Learning, University of Warwick, Coventry, UK

Nilufer Korkmaz Yaylagul Department of Gerontology, Akdeniz University, Antalya, Turkey

Suzan Yazici Department of Gerontology, Akdeniz University, Antalya, Turkey

José Alberto Yuni CITCA-CONICET (National Council of Scientific and Technological Research), Sciences Education Department, Faculty of Humanities, National University of Catamarca, Catamarca, Argentina

George K. Zarifis Department of Education, School of Philosophy and Education, Faculty of Philosophy, Aristotle University of Thessaloniki, Thessaloniki, Greece

Xinyi Zhao Institute of Medical Humanities, Peking University, Beijing, China

About the Editors

Professor **Brian Findsen** has worked in the field of adult and continuing education for over 30 years, primarily in his home country of New Zealand but also in the UK (University of Glasgow, 2004–2008) as a manager, teacher and researcher. He completed his doctorate in adult education at North Carolina State University, USA, in the 1980s. Amid his various publications, he co-edited *The Fourth Sector: Adult and Community Education in Aotearoa New Zealand* (1996), wrote as sole author, *Learning Later* (2005), and in 2011 he co-authored the publication of *Lifelong Learning in Later Life: A Handbook of Older Adult Learning*, written with Marvin Formosa, University of Malta.

E-mail: bfindsen@waikato.ac.nz

Dr. **Marvin Formosa** is Senior Lecturer and Head, Department of Gerontology, Faculty for Social Wellbeing, University of Malta. His key interests are critical gerontology, sociology of later life, social class dynamics, and educational gerontology. Recent publications include *Lifelong Learning in Later Life* (with Brian Findsen, 2011), *Learning Across Generations* (with Schmidt-Hertha and Jelenc Krašovec, 2014), *Social Class in Later Life* (with Paul Higgs, 2015), *Population Ageing in Malta* (with Charles Scerri, 2015), and *Ageing and Later Life in Malta* (2015). Dr. Formosa also holds the post of Chairperson of the National Commission for Active Ageing (Malta) and Director of the International Institute on Ageing, United Nations – Malta (INIA).

E-mail: marvin.formosa@um.edu.mt

Chapter 1

Introduction

Brian Findsen and Marvin Formosa

1.1 Rationale

In the last two decades the area of older adult education (sometimes labelled ‘educational gerontology’) has received increased attention across the globe, especially in countries where the older adult population has reached undeniably high proportions. This is far from surprising considering that population ageing is perhaps the most significant trend of the twenty-first century. Suffice to say that around the world, two persons celebrate their sixtieth birthday every second – an annual total of almost 58 million sixtieth birthdays (United Nations Populations Fund and HelpAge 2012). With one in nine persons in the world aged 60 years or over, projected to increase to one in five by 2050 (ibid.), population ageing is a phenomenon that can no longer be ignored. It is also noteworthy that due to the present and projected growing number of older persons in the ‘fourth age’ (Laslett 1989), the age of greater dependence, community care and nursing home settings are increasingly becoming a key facet of public policy initiatives. It is therefore difficult to overstate how population ageing is contributing to far-reaching changes in the wider social fabric. Education and learning are no exception, and never has the plea for a lifelong educational and learning framework been more urgent.

It is welcome to note that at the turn of the millennium there surged a steady stream of publications addressing features of learning in later life. These ranged

B. Findsen (✉)

Te Whiringa School of Educational Leadership & Policy, Faculty of Education,
University of Waikato, Hamilton, New Zealand
e-mail: bfindsen@waikato.ac.nz

M. Formosa

Department of Gerontology, Faculty for Social Wellbeing,
University of Malta, Msida, MSD 2080, Malta
e-mail: marvin.formosa@um.edu.mt

from policy-linked documents such as *Learning to Grow Older and Bolder* (Carlton and Soulsby 1999), *The impact of learning on health* (Alridge and Lavender 2000), and *Demography and older learners* (Tuckett and McAulay 2005) to academic texts such as *Teaching and learning in later life* (Glendenning 2000), and *Learning in later life: An introduction for educators and carers* (Jarvis 2001), *Older people learning: Myths and realities* (Withnall et al. 2004). These works brought about a better understanding of how learning brings satisfaction in later life. All emphasised how the family, churches, social and sports clubs remain as important sites for learning in later life. Later one witnessed other books that continued to expand such interests. These included *Learning later* (Findsen 2005), *What people learn* (Tuckett and Alridge 2007), *Older people's learning: An action plan* (McNair 2009), and *Choice and opportunity: Learning, wellbeing, and the quality of life for older people* (ibid 2010). The inter-connectedness of learning to other aspects of life shone strongly in these outputs.

Given increasing life expectancies, the imperative for 'active ageing' has become prominent, and the question of how older people find meaning and satisfaction in their lives is now to the forefront at multiple levels – personal, family, societal, governmental and global. Such issues were tackled in *Improving learning in later life* (Withnall 2010), *Active Ageing and Universities: Engaging older learners* (Phillipson and Ogg 2010), *Age is just a number? Rethinking learning across the life course* (Slowey 2008). Older adults are a heterogeneous group leading diversified lives, many of which are beyond the thinking and reality of previous generations. The advent of globalization and accompanying transformations in information and communications technology points to ever-differing life trajectories of ageing populations both within and across nation states. Further, these trajectories are closely connected to geographical location (urban/rural), gender, socio-economic status, health, cultural background, (dis)ability and other factors. These differential patterns of living have been well discussed in publications such as *Education in an ageing society* (Mercken 2004) and *Keeping people active: Continuing education programs that work* (Preece and Findsen 2007).

The 2000s also witnessed an upsurge of critical works that questioned the positive impact of mainstream late-life learning on learners' quality of life. One on hand, critics pointed out that evidence claiming the positive impact of learning on health status is patchy (Withnall 2010). It is claimed that the evidence underlining that those who engage in late-life learning have more positive health outcomes may be the result of the fact that those who do engage have higher-than-average health outcomes (Jarvis 2011). On the other hand, critical educators called for attention to the triumvirate of knowledge, power and control, and asked: Whose interests are really being served? Who controls the learning process? How is quality of life enhanced by education? For example, Formosa (2007) argued that the University of the Third Age in Malta is serving as a strategy for middle-class elders to offset the class-levelling experience resulting from retirement. In the way that books and paintings are used to impress social viewers, membership is employed as a strategy of class 'distinction'. On similar lines, the older adult education movement has been criticised for disregarding the interests of older men, those living in rural areas, ethnic minorities, and frail elders (Formosa 2010, 2012).

In more recent times, publications focused on contemporary issues that were to a large extent left undisturbed in previous years. For instance, *Active Ageing, Active Learning* (Boulton-Lewis and Tam 2012) focuses on the notion of ‘active ageing’ principally in the Asia-Pacific region, and is an example of a review of work in late-life learning in one specific continental region, and *Learning across generations in Europe: Contemporary issues in older adult education* (Schmidt-Hertha et al. 2014) provides a snapshot of inter-generational learning across the European continent and highlights how intergenerational learning has immense potential to reach new forms of solidarity between younger and older generations. Another emergent strand of literature concerns men’s attitudes to and involvement in lifelong and life-wide learning by showcasing evidence from theory and research. For instance, whilst *Men learning through life* (Golding et al. 2014) inform national and international policies and practices related to the learning and wellbeing of adult and older men, *Older men learning in the community: European snapshots* (Krašovec and Radovan 2014) acts as a platform to inform the key role that informal contexts have for older men learning.

It follows that while there are instances of insights into a conglomerate of nations’ links to lifelong learning and ageing, there has been no example of a more ambitious collection of perspectives and analyses on a global scale. Truly, one finds an impressive output of publications on older adult learning and education. Nevertheless, it is largely restricted to a British and rather Eurocentric conception of the world at a time when globalization is assuming greater importance and there is increasing need for better cross-cultural understanding in a world of rapid social change. As the above books, reports and papers attest, older adult education is changing and developing at a tremendously fast rate. Indeed, the international education scene with respect to older learners has been profoundly transformed in recent times, but its reporting is uneven and largely fragmented. As we underlined half a decade ago,

It is a challenge to report on the development of older adult learning in Asian, African, and Central and South American continents. It is not that countries in these continents lack older adult learning. Indeed, non-formal and informal learning activities for older persons are truly alive and kicking in these continents. Yet, academic discussions and analysis of programmes’ historical development in the English language are hard to locate...the international perspective on the historical development of late-life learning still has to be written, or at best, made globally accessible. We hope that in the coming few years the challenge is taken up and an international handbook on older adult learning is published (Findsen and Formosa 2011, pp. 59–60).

To compound matters, the components of older adult education are increasingly dispersed amongst a vast array of agencies and participants, into a variety of learning contexts, through many various modes of provision and educational approaches, while the number of older adults participating actively is increasing dramatically, especially in ‘high-income’ countries. For instance, the renowned University of the Third Age has now diversified in five separate models ranging from the west European originated by the late Pierre Vellas, the Anglo-Saxon model practised particularly in the United Kingdom and in most English-speaking countries, the

North American French-speaking model, the South American model, and the Chinese model (Formosa 2014). When one considers that changes are taking place in other third age learning, this international book provides a map, albeit rather fragmentary, for those who wish to find their way through the contemporary world of older adult learning with all its cultural and national variations.

1.2 Focus

This edited volume has brought together this collection of country/regional analyses to assist and support actors and commentators in older adult education to interpret and reconstruct their field. The goal was to construct an edited volume of writings from around the world (balancing ‘first’, ‘second’ and ‘third’ world perspectives) on learning and education issues faced by older adults in different parts of the globe. This has not previously been undertaken, and therefore, presents varied perspectives on what it means to ‘age’ in different cultural/national contexts and how learning/education intersects with this process. The key objectives are twofold. First, to map and interpret from ‘insiders’ the character of older adult learning/education in selected countries/regions, and secondly, to seek a concentration on issues related to older adults’ learning, an approach that is consistent with a critical gerontological approach. The word combination ‘learning/education’ is sometimes used in this book rather than the words ‘learning’ and ‘education’ separately. While learning tends to be all-pervasive, life-long and life-wide (experienced by people in informal, non-formal and formal contexts), ‘education’ in this book represents systematic, organized learning where assessment and accreditation may be employed. It is tightly structured, often hierarchical, and usually provided by the state or organizations (which may be public or private). When it is difficult to distinguish between learning and education in a specific instance (where does one start and finish?), the phrase ‘learning/education’ may be used to capture all possibilities. In some chapters, the emphasis is placed by authors upon education (where government provision and policy development tends to be emphasized) rather than learning or the reverse may be true (where informal learning in community settings tends to be accentuated). It is also the case that a given author may not ‘see’ the learning by older adults but does observe the structures for education. Hence, across chapters the emphasis varies. Noteworthy, too, is the fact that governments commonly support the use of the phrase ‘life-long learning’ in their rhetoric as it does not require expenditure from the public purse. On the other hand, ‘lifelong education’ does necessitate a long-term structure for organized learning and would normally be expected to be funded, in part at least, by the state. The role of governments in providing structures for older adult education (usually as a sub-set of lifelong education) is critiqued in this volume and in most cases the demand is well ahead of supply of funding or other resources.

International perspectives on older adult education is intended to be a country and/or regional-specific account of research, policy and practice of older adult

education – that is, education for learners in later life – that asks the following questions: What is the state of older adult learning/education in your country? Where is the practice of older adult education going? What are the key debates/issues that comprise this area of education practice? This ‘international perspectives’ volume of 42 individual contributions is written for academics, researchers, practitioners and post-graduate students. To a greater or lesser extent, it delivers a retrospective and prospective overview of older adult learning/education, one that looks at the past, present, as well as the future. In effect, it provides a *map* to the focus question: what defines the nature of older adult learning/education in this part of the world? What signs/indications are there for new directions? It is intended that this book should function as a manual and a resource for practitioners and researchers alike. To provide a guideline on what might be appropriate to include in a chapter for this book, invited authors were made aware of the following framework and to address those aspects most pertinent to their country/region:

- What historical formations have influenced the development of older adults’ learning?
- Identify and discuss those significant organizations and persons who have contributed to the growth and development of older adult learning?
- What does older adult learning look like today (its key characteristics, structure and organization, and relevant legislation)?
- What key concepts and/or theoretical perspectives have guided the implementation of older adult learning?
- How has the development of opportunities for older adults been assisted/impeded by the state? In other words, comment on the influence of government policy on older adult learning?
- Which groups in society benefit the most from the existing system and which the least? Explain why.
- What key issues and problems face educators in sustaining older adult education?
- What does the future look like for older people’s learning?
- Provide a brief case study of a “successful” initiative in older adults’ learning.

It needs to be emphasized that this set of questions (framework) functioned as a guide to authors only; in different socio-cultural contexts, some questions have greater salience than others. It is fair to comment that these questions emerged from a Western way of thinking and reflect the dominance of educational gerontology from Western Europe and North America. Nevertheless, while underlying assumptions may have proven invalid in specific contexts, the framework has given a sense of direction for argumentation in the chapters. No book can possibly represent all viewpoints of older adult learning/education. The selection of authors/countries is based on maximising the effectiveness of understanding the problematics of older adult education cross-culturally and cross-nationally. This book is, therefore, not intended primarily as a comparative analysis. Its aim is much more modest – to provide an academic perspective on older adult learning/education in a wide range of countries in the contemporary world. It is, hence, an exercise in *international*, not

comparative, older adult learning/education. Yet points of comparison will emerge for readers even in terms of what authors have chosen to emphasize or leave out of their accounts.

The intent of *International perspectives on older adult education* is to embrace a wide range of countries and regions of varying ideologies, size and extent of modernization (urbanization/industrialization). The choice of areas from which to seek writers was neither random nor non-random. As editors, we were conscious to gain broad representation from across the globe to elicit diverse perspectives on educational gerontology developments to include countries where modernization is advanced (e.g. the United States of America) or under-developed (e.g. Zimbabwe). We wished to include large countries (or regions) and very small entities. While we were mildly aware of ideological differences in economic systems (capitalist/socialist) and cultural variations, these were not strong driving forces. Instead, given the over-riding desire to encompass diversity, we sought a more pragmatic path in choosing both country and prospective authors. In deciding whom to invite to construct a chapter, we were conscious of the paucity of potential writers in specific countries, especially those with sufficient current knowledge of learning in later life. In reality, we recognized that authors would usually emerge from a background of adult/continuing education (and apply their thinking to the older adult population) or from social gerontology (and apply their thinking to a lifelong learning agenda) or cognate disciplines. As co-editors, we ourselves have relative strengths in lifelong learning and social gerontology and we sought to build on our respective strengths. Prospective authors based on our professional backgrounds, contacts and geographical location were invited to write chapters related to the previously-announced set of questions. While most invitees readily agreed, in some instances we used snowballing techniques to identify suitable candidates when early invitees declined to participate or withdrew belatedly. In some instances, especially for “developing” countries, we anticipated that this would be the first time anyone from that country had attempted to map what counts as knowledge in later life learning/education.

1.3 Structure and Content of the Book

The book contains 42 separate chapters from a country or region. In the case of the UK and of Nordic countries, we decided to seek an overview of that entire region rather than individual chapters. We had to draw the line somewhere even though the reality may have been that other countries in these regions could have produced convincing accounts of their country’s trends and issues in later life learning. The breakdown of countries according to continents is as follows: seven from the Americas (North and South); 10 from Africa, nine from Asia, two from Australasia, and 14 from Europe. Hence, the overall total for country/regional accounts is 42. This distribution could not have been decided in advance. Yet, we knew we required, in terms of balance, a fairly wide range of countries per continent. There are some

glaring omissions from the final population of countries (e.g. Egypt) and some of these are explainable from the viewpoint of two Anglophone speakers/writers operating as the co-editors. Despite our efforts to encourage writers from some countries to participate, in the end none eventuated. While the total count of 10 contributions from Africa is to be celebrated, it does not include a participant from North Africa and its selection pattern is rather dependent on authors residing in countries where adult/continuing education historically has been strongest in universities (and, hence, providing author(s) with the necessary academic background to construct a chapter). One must of course acknowledge a tension between standardisation (reliability) and authenticity (validity) in chapters. To the extent that authors adhered to the framework and presented description and analysis under the specific headings/questions, there is the possibility of modest comparability across chapters. However, authors had the right to select whatever was of real significance to the immediate context, illustrating individual distinctiveness. In this case, they chose elements of special significance to “tell their story”. We have not endeavoured to reconcile these two divergent patterns emergent from the chapters. Each author was given the freedom to identify what is important to discuss in that context. As a case in point, some authors chose to emphasize the exemplar of a programme illustrating a “successful” initiative with considerable vigour and in some instances undertook original, usually small scale, research on the selected initiative. The exemplar served to illustrate more general trends in later life policy and/or practices. On the other hand, some authors ignored this suggestion and instead focussed more on policy issues affecting provision, taking a more “macro” approach.

Readers of this book may choose to concentrate on regions or continents to gain a fuller appreciation of issues and trends in later life learning for that part of the world. In so doing, they may identify themes which emerge more strongly in one area of the world rather than another. For instance, in the African context, where the urban/rural divide is especially pronounced and poverty is widespread, the relative inability of government policies to filter down to the village level is quite stark. Government policy is virtually absent; where it does exist, it is concentrated on the younger generations where the population is more plentiful. Equally, in the Asian environment, where proportionately there are greater numbers of older people in several countries (e.g. Japan), in so-called “aged societies”, the socio-cultural context is such that social protectionist policies are very important, especially for the “old-old” in societies. While it is still more the norm than the exception that younger generations will protect their elders under a regime of filial piety, there is active contestation of this trend. Governments tend to provide a safety net beyond the family, in part from recognising that traditional values of reciprocity across generations have been severely challenged.

Other readers may choose to select chapters using a different lens – the chapters are presented in alphabetical order for ease of identification. For example, an analysis based on relative size of a country may prove instructive, as exemplified by the inclusion of two very small countries, Lesotho and Malta. However, the country known as South Korea to many external observers is known officially as the Republic of Korea in diplomatic circles. From within the country, the title “Korea” is

commonly used. While the chapter title is under the official name (Republic of Korea), we as editors have honoured the preference of these authors to use the name “Korea” throughout their chapter. Hong Kong, though technically part of mainland China, is presented as a separate entity; so, too, is Taiwan. Overall, many countries in Asia, as exemplified in this book, are addressing the ageing population issue with considerable force and later life learning opportunities are increasing as a consequence as governments have taken the issue of an ageing population seriously.

Finally, one must recognise that for some authors, their contribution to this book has been exercised in challenging circumstances where civil war and/or the spread of disease have been potential barriers to overcome. In some ideological contexts, content may be cautiously presented to avoid possible recourse from authorities, particularly in presenting historical societal trends and their impact on access to education. We appreciate the special efforts made by such authors to participate in this edited volume. Overall, this book provides readers with a wide range of perspectives on later life learning/education covering the full spectrum of countries where governments have engaged seriously to those that are yet to embrace lifelong learning as a driver of policy or funding. It is important to incorporate a full appreciation of learning in later life from formal to non-formal to informal opportunities in specific countries/regions and to recognize that increasingly even the most recalcitrant countries will feel pressure to develop favourable learning conditions for people to better enjoy learning in later life.

References

- Alridge, F., & Lavender, P. (2000). *The impact of learning on health*. Leicester: NIACE.
- Boulton-Lewis, G., & Tam, M. (Eds.). (2012). *Active ageing, active learning: Issues and challenges*. Dordrecht: Springer.
- Carlton, S., & Soulsby, J. (1999). *Learning to grow older and bolder*. Leicester: NIACE.
- Findsen, B. (2005). *Learning later*. Malabar: Krieger.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult education*. Rotterdam: Sense Publishers.
- Formosa, M. (2007). A Bourdieusian interpretation of the university of the third age in Malta. *Journal of Maltese Education Research*, 4(2), 1–16.
- Formosa, M. (2010). Universities of the third age: A rationale for transformative education in later life. *Journal of Transformative Education*, 8(3), 197–219.
- Formosa, M. (2012). European Union policy on older adult learning: A critical commentary. *Journal of Aging and Social Policy*, 24(4), 384–399.
- Formosa, M. (2014). Four decades of universities of the third age: Past, present, and future. *Ageing & Society*, 34(1), 42–66.
- Glendenning, F. (Ed.). (2000). *Teaching and learning in later life*. Aldershot: Ashgate.
- Golding, B., Mark, R., & Foley, A. (Eds.). (2014). *Men learning through life* (pp. 3–19). Leicester: NIACE.
- Jarvis, P. (2001). *Learning in later life: An introduction to educators and carers*. London: Kogan Page.
- Jarvis, P. (2011). The age of learning: Seniors learning. In K. Rubenson (Ed.), *Adult learning and education* (pp. 163–170). Oxford: Elsevier.

- Krašovec, S., & Radovan, M. (Eds.). (2014). *Older men learning in the community: European snapshots*. Ljubljana: Ljubljana University Press.
- Laslett, P. (1989). *A fresh map of life: The emergence of the third age*. London: Weidenfeld & Nicholson.
- McNair, S. (2009). *Older people's learning: An action plan*. Leicester: NIACE.
- McNair, S. (2010). *Choice and opportunity: Learning, wellbeing, and the quality of life for older people*. Leicester: NIACE.
- Mercken, C. (2004). *Education in an ageing society*. Sittard: Drukkerij.
- Phillipson, C., & Ogg, J. (2010). *Active ageing and universities: Engaging older learners*. London: Universities UK.
- Preece, J., & Findsen, B. (2007). Keeping people active: Continuing education programs that work. In M. Robinson, W. Novelli, C. Pearson, & L. Norris (Eds.), *Global health and global aging* (pp. 313–322). San Francisco: Jossey-Bass.
- Schmidt-Hertha, B., Krasevoc, S. J., & Formosa, M. (Eds.). (2014). *Learning across generations in Europe*. Rotterdam: Sense Publishers.
- Slowey, M. (2008). Age is just a number? Rethinking learning across the life course. *Ageing Horizons*, 8, 22–30.
- Tuckett, A., & Alridge, F. (2007). *What people learn*. Leicester: NIACE.
- Tuckett, A., & McAulay, A. (2005). *Demography and older learners: Approaches to a new policy challenge*. Leicester: NIACE.
- United Nations Populations Fund & HelpAge. (2012). *Ageing in the twenty-first century*. New York: United Nations Populations Fund and HelpAge.
- Withnall, A. (2010). *Improving learning in later life*. London: Routledge.
- Withnall, A., McGivney, V., & Soulsby, J. (2004). *Older people learning: Myths and realities*. Leicester: NIACE.

Chapter 2

Argentina

José Alberto Yuni and Claudio Ariel Urbano

2.1 Introduction

Argentina's levels of ageing population are of the highest in Latin America (CEPAL 2009). Demographic transition began in the 1970s that along with other internal migration processes, generated the paradoxical situation, in the big urbanized areas, of highly inhabited by older adults, while in the rural areas the migration of young people caused the aging of the social structure. The heterogeneity and diversity of the "national situation" is a mosaic of educational experiences of diverse nature, intentions, purposes and recipients that hinders a description and understanding of the specific modes involving the praxis of older adults' education (Yuni 2011).

The first part of the chapter is a characterization of the institutionalization and development dynamics of different circuits in the last few decades. The second section deals with those aspects that define the theoretical-practical construction underlying the praxis in education of older adults. The third section considers some problematic issues affecting the sustainability of older adults' educational experiences in the country. Finally, the last section describes the challenges signaling the future in organizational, methodological and gerontagogical terms.

J.A. Yuni (✉) • C.A. Urbano
CITCA-CONICET (National Council of Scientific and Technological Research), Sciences Education Department, Faculty of Humanities, National University of Catamarca, San Fernando del Valle de Catamarca, Catamarca, Argentina
e-mail: joseyuni@yahoo.com.ar; claurbano@hotmail.com

2.2 Organizational Models in Older Adults Education in Argentina

OA's education in Argentina recognizes a socio-institutional process of several decades, during which various circuits were made, that answers to different gerontological, organizational, and curricular logic (Yuni and Urbano 2008a, b). This section includes a description of these circuits, as well as the conditions of its institutionalization, organizational logic, the approach taken in relation to OAs, and its impact in terms of coverage. The second part considers updated organizational tendencies produced during the last two decades.

2.2.1 *The Institutionalization of Older Adult Education*

Institutionalization of older adults' education started in the 1980s (Yuni and Urbano 2006a, b) as a result of the convergence of multiple socio-political factors (Zolotow 2004). But the return to democracy in 1983 meant the revitalization of the Reform principles in the universities¹ (Rodríguez 2009). The creation of the Department of Middle and Third Age in the National University of Entre Ríos in 1984 is considered as the landmark in older adult education in Argentina. Its creation renewed universities' social commitment through extension service (Yuni 2006, 2003). University programmes later created followed the organizational, educational, and methodological lines chosen by the aforementioned university.

Nowadays, of the 47 public universities, 24 develop programmes for older adults. Among the main features of the Argentine model for older adults,² the following stand out. First, its ideological bases answer to the Latin American conception of university extension service to the community, which in practice gave birth to an "emergent" conception of specific teaching-learning criteria for older adults (Ruiz et al. 2008). Its organizational mode is conceived as an articulate, systematic, and systemic group of teaching, research and extension activities. A well-known and generic name for present programmes is *Programa Universitario para Adultos Mayores* (PUAM) (University Programme for Older Adults). In order to fulfill its aims, PUAM's actions are based upon the viewpoint of education as a transmitting, forming, and humanizing process (Urbano 2010). Secondly, the curricular selection considers teachers' academic profile (mostly university teachers), emphasizes the

¹The University Reform of 1918 was a socio-political movement of students started at the University of Córdoba. The Reform proposed an institution committed to social issues and groups. This movement extended all through Latin America and succeeded in defining the mission of the public university.

²Programmes or University Programmes are so called because university legislation in Argentina does not allow certain activities to take the name of Universities for Older People or Universities of the Third Age as is in other countries, that is why, activities are generically called Education for Older People.

transmission of high-quality scientific contents, and the articulation with research work and processes not only in the older adults' classroom but also with research projects in the university (Petritz 2003). All university programmes in Argentina are based on the concept of 'open curriculum' (Yuni 2009), thus offering a wide range of options to each participant. The acquisition of specific knowledge deserves granting certificates to attendants. In spite of the curriculum openness and flexibility, programmes are structured into levels and different fields of knowledge. Activities offered by PUAM are realized through semesters or yearly courses, which aim at specific specialization and the achievement of higher competence. The Argentine model differentiates from the French or the English ones, because it systematizes the distribution of knowledge and certifies its levels. And finally, methodological-didactic strategies emphasise active, participative, and productive approaches for the aged. This is the result of the Latin American extension service tradition and the influence of new trends in the field (Rodríguez 1997). University programmes foster an inter-generational approach by including, as participants, people older than 50 and even older than 35 years old. As regards teachers, they are often young graduates or senior university students. These programmes also offer professional practice in gerontological issues by systematizing the experience through research (Yuni 2000; Yuni and Urbano 2008a, b). Various universities foster education for volunteer work or community project production including older adults' knowledge transference (Yuni 2010).

2.2.2 Open Universities for the Third Age

Another non-formal educational circuit for older adults, started in 1993 is that of *Universidad Abierta para la Tercera Edad* (UATE) (Open Universities for the Third Age). Nowadays, there are seven institutions. It was originally created by the Uruguayan teacher Alondra Bayley, who was inspired by Freire's pedagogy on participative didactic and curricular strategies (Cruz and Pérez 2006). There are more than 100 Latin American organization members grouped under *Red de Universidades Abiertas* (RUA) (Network of Open Universities) (Red UTE 2008). Generally, these organizations are present in little towns in the central region of the country increasing educational possibilities for older adults who self-manages them. Institutionally, UATEs belong to cooperatives or civil society organizations. They take the name of Universities because they intend to foster the experiential knowledge obtained in the 'University of Life'; in the same way, UATEs sustain the ternary conception of life in terms of the Third Age.

The open curriculum approach is a good choice for older adults since they can choose courses according to their interests. The UATE circuit includes a wide range of issues from formative activities to scientific ones. Many older adults of middle to high income, generally professionals, lead the construction of an educational space that allows them to be socially visible. Thus, the functioning logic is built around an experience of socialization among peers, with a low inter-generational interaction.

2.2.3 *Universities for the Integrated Older Adults*

Agreements made among public, private universities and PAMI created in 2008, a new programme called UPAMI³ (Universities for the Integrated Older Adults). According to this arrangement older adults can start non-formal education actions, in that it is different in its conception and scope to traditional university programmes for the older adults previously mentioned.

The name UPAMI conveys the idea underlying the proposal. The term ‘programme’ refers to the action of a financing institution, external to universities. Universities become beneficiaries of the programme offering a free educational service aimed at the social integration of PAMI members. The preposition ‘for older adults’ in the name of the initiative reveals the gerontagogical position of the programme as it places older adults as recipients or users of the proposal (Yuni 2000). But on the whole, institutional discourse connotes a social service assisting vision (Orte 2006; Yuni 2000).

The notions of active ageing and lifelong learning are embedded in the UPAMI programme institutional discourse, as a basis for its proposal. Although the programme has a national scope and intends to cover the whole territory through agreements with public and private universities, it lacks the necessary structure to carry on educational activities, or its programmatic, methodological or didactic orientation (Yuni 2011) These experiences, thus, cannot be considered as university programme for older adults (PUAM), they have to be thought of as non-formal educational activities the universities offer for the aged. The UPAMI programme also follows the flexible and open curriculum, easily adaptable for each university’s features. A common element in the curricular offer along the country is the presence of four kinds of courses: digital literacy, memory stimulation, rights and citizenship, and life quality. Quantitatively, the impact of this programme can be determined by the rapid expansion of the universities, including private ones, offering activities for OAs, and their growth in number all over the country. Then, of the 47 public universities, 35 participate of the programme through 67 headquarters. Of the 49 private universities, 15 have joined UPAMI. Only in the first semester of 2013, UPAMI presented 2001 courses, aimed at a population of 32.303 older adults. During the last 5 years 5.877 courses have been offered, with the participation of 90,320 people. Thus, UPAMI programme findings takes an action of social politics strengthening universities as non-formal OA education providers.

³The National Institute of Social Services for the Retired People was created (INSSJP is the acronym in Spanish, henceforth known as PAMI). This organism is responsible for the administration of social security for the retired people and it is to this day the largest organization in Latin America for direct socio-sanitary attention, having 4,450,000 members.

2.2.4 Reconfiguring Tendencies in Older Adults' Education

Non-formal education for older adults in Argentina constitutes a heterogeneous field which developed marginally for the last three decades and without the support of public policies, especially those with an educational background. But transformations and socio-political processes reconfigured the scope of older adults education.

The 1990s were characterized by the imposition in all Latin America of a neoliberal logic of efficiency in the universities (Puiggrós 1994). Thus, the reduction of the state financing funds forced universities to generate their own resources through service provision and the extension or transference to social sectors with a certain income. From the beginning PUAMs lacked any kind of financing help from university budgets, and they have never had any federal or provincial contribution either. Therefore, neoliberal policies led them to the search of possible clients and consumers of the community services they provided. This led to incorporate courses for older adults into the curricular offer. Thus, contents were reoriented from an academic approach towards an offer with elitist proposals, 'fashionable' or 'in-vogue' courses. Fee payment by attendants to courses allows PUAMs to finance educational service. This process brought about an ideological displacement. Neoliberalism considered (mainly university managers) that older adults education is a merchandise to be sold to those with a certain purchasing power who might grant social prestige. The social crisis generated by the economic model increased educational needs of older adults, and consequently, their population in universities. The situation changed the logic of the Argentine PUAMs: (1) some programmes sustain the notion of education as a right and social goods, and (2) there are university programmes which view OAs' education as the distribution of some educational products.

Public policies opposite to the 1990s neoliberal model led the government, which took office in 2003, to give strong support to the universities in order to back up educational actions with OAs. Through financing specific projects, PUAMs were stimulated to develop educational activities with low class or socially vulnerable OAs, at the same time fostering the creation of volunteer and inter-generational projects. The new National Education Act (passed in 2006) furthered a conception of inclusive public and social politics. Although this act does not acknowledge OAs' education as a subfield it does include the aged as the recipients of the modality and lifelong learning as an educational principle of the actions generated in its domain (Yuni and Urbano 2014). OAs is explicitly mentioned in the text as those educational subjects who the right to basic education. This Act defends the right to education of that 6 % of the population older than 60 who did not attend school, and of that 29.5 % who did not finish primary school or could not complete basic education. Recently, the educational private market has also answered to middle- and upper-class older adults' demands for cultural goods by offering courses. Along with this outburst, city's municipalities also offer recreational and educational activities for the aged.

Finally, the dynamics of socio-political processes of the last two decades saw a variety of proposals and organizational models that led to the growth of offers. Though there are socio-cultural segmentations, differences by social origin, and educational needs.

2.3 Theoretical Perspectives Orienting Argentina's Older Adult Education

Institutional development of older adult education in Argentina has been designed through different circuits sustaining various organizational modalities. Nevertheless, certain approaches and conceptions observed reveal some theoretical continuum in dealing with the practices. Older adult education is characterized by different ideological orientations, articulating certain political values with diverse gerontological traditions (Yuni and Urbano 2005). Thus, nominal differences existing among the terms 'education of older adults', 'education for older adults', 'education with older adults' and 'education among older adults' unveil different modes of thinking and performing this praxis (Hübner 1998; Lirio et al. 2008). These ideological orientations are expressed in the institutional rationality, the meanings that are present in the organization and how power, authority, and participation are built. The expression 'institutional rationality' refers to the articulation of practices with the institutional vision on old age, aging and lifelong education. The Argentine case shows how the institutional vision sustains a group of representations, discourses and practices about aging. It allows them to show capacities as well as new acquisitions and realizations. Then, discourses in educational institutions of older adults hold a positive view of aging, characterized by a number of markers, such as:

Productivity is considered as an eminently human capacity of creation, production and transformation of themselves and the environment. Thus, they can perceive the sense of their contribution to the community, they belong to. The bases of active, healthy, and successful aging are competence (that is, the capacity for adaptation and social performance), autonomy, and effective decision taking. Institutional discourses of education and lifelong learning imply the potential role of transforming people, institutions and society. This viewpoint contains several components. Primarily, that education is a socio-cultural tool through which a lifelong humanization process is favored. The education of older adults allows them to approach other dimensions of personal development. Education aims at widening their representational universe through educational *dispositifs* (Urbano and Yuni 2013a, b). As spaces of institutional circulation, production, and reproduction show a constant exchange between knowledge and skills of different kinds among generations, and among various subjects with different visions and knowledge about the world and about being-in-the-world. Knowledge is, thus, the subjective and inter-subjective means and the basis on which the human action over the internal and social worlds is structured. Therefore, these *dispositifs* consider older adults as builders of socially

meaningful knowledge. Furthermore, that education is a right that must be accessible throughout life. Therefore, educational institutions become responsible for creating opportunities involving older adults themselves in activities backed up by the philosophy of lifelong learning and intergenerational education. The notion of *dispositif* for older adults is seen as the fulfillment of this right, so, it becomes a sort of compensatory inter-generation circle by which: (a) it satisfies older adults' cultural needs; (b) it answers their educational demands; (c) they contribute to their support through their work and tax payment. And irrevocably, non-formal educational dispositions foster older adults' creative and productive energies. Participation at an advanced age can become a "transforming experience", since it contributes to identity re-signification of OAs in their social dimension (Urbano 2010). Therefore, education favours change in the subjective and personal dimension that influences on the older adults' social identity.

Generally, older adults' education experiences in Argentina emphasize the role that education has on empowering and learning new social roles or the re-signification of traditional ones (Yuni 1996). These experiences move older adults' to participate in different actions and projects in which their productivity and social influence needs are materialized (Yuni and Urbano 2010). This institutional generative dimension is related to the following aspects. First, institutional discourses emphasize the potential for older adults' social contribution as a social group; thus, they find a space for experimentation and exercise of new social roles and participative and collaborative practices. For contemporary generations of older adults it implies the learning of new relationship modes, because their social participation was shaped by socio-political processes of authoritarian quality, in the context of a chauvinist culture. Secondly, these institutions advocate the basic belief that the human species has the innate capacity of conquering the best of themselves through creation, upbringing and self-caring. Educational *dispositifs* provide a set of representations which uphold one of the conditions of generativity proposed by Erikson (Urbano and Yuni 2005), the basic belief in humans. It shows older adults their capacity of transforming others and themselves. Educational institutions acknowledge older adults as potential participants in this socially creating task by following their own strategies, which range from socio-cultural practices to the construction of meaningful networks and exchanges.

Third, institutions involve the aged in activities in which they renew their interest and commitment with the welfare of future generations and their own. Educational activities represent a powerful stimulus in older adults' daily lives; these may cover a wide range of social problems affecting the most vulnerable social groups. Besides, the efficiency of the educational *dispositifs* contributes to the building of a more complex, holistic and integral conception of human life and its conditioning factors. Thus, institutions establish a dialectics in which older adults satisfy their need for acknowledgement, integration and social contribution by answering the needs of their fellow men. Consequently, daily activities become meaningful. And finally, institutional discourses and practices sustain the generativity of the participants in two key ways. They appeal to the capacity of older adults to influence their environments by channeling their generative aspects, thus reinforcing the value of

their social contribution (Kotre 2006). Then, vulnerable groups can be benefited by the older adults' capacities and constructive energy. Meanwhile, older adults increase self-esteem by being useful to others, in this way they overcome social segregation and isolation.

2.3.1 Case Study: Older Adult Education Programme in the National University of Río Cuarto

This section deals with a case of good institutional practices in non-formal older adult education *dispositif*. 'Good' institutional practices mean those which, in the structuring of projects and activities, articulate the agency and community dimension of generativity (Erikson and Erikson 2000). The last decade saw the deepening of some aspects of universities' organizational beliefs on the relationship between education and active, participative aging. They created a curriculum inspired on the thinking of older adults as subjects and agents of cultural participation and social transformation. The object of our discussion is PUAMs because, in their orientation, they held and defended education as a person's right and public social goods. It is an open and flexible curriculum that allows older adults to migrate from one course to another, as they progress in a specific field; nowadays they are trying other alternative and complementary courses.

The case chosen is a non-formal education programme in a public university of the interior of the country. It is organized by the National University of Río Cuarto (Córdoba): the Older Adult Education Programme (*Programa Educativo de Adultos Mayores*, PEAM) has been working for 22 years. There are 1300 members, distributed in different courses inspired in the Permanent Education model. It offers more than 70 courses related to a wide range of issues. Courses are taught not only at the university campus, but also in various social institutions. All activities are free of charge for older adults and financed by the university budget. The Student Centre allows the integration of the participants into different management roles and the planning of academic and community transference activities. Once the participants complete the different levels of a course, they can choose another thematic field or engage in another programme option, called "management units". This organizational *dispositif* is structured as a space of self-management, production and transference of the previously acquired knowledge. Older adult students who, after acquiring the theoretical and/or practical foundations of a field of knowledge, wish to deepen their study into it can apply that knowledge into a social intervention project – that is, by putting different types of productivity into work they can become part of a management unit.

Each management unit is supported by a host, who contributes to holding group dynamics and steering the group's energies to the attainment of various activities the group has chosen beforehand. A similar organizational sequence can be observed in every unit: (a) participative planning; (b) developing the project's activities; (c)

socializing the actions; and (d) participative assessment of the actions with their recipients and with the programme members. The aim of management units is the production of socio-cultural goods, staging shows, holding exhibitions presenting the group's research process, engaging in intergenerational educational projects, participating in community projects of social development, and educational and recreational assistance to other organizations of older adults, such as: retirement centers. Their common feature is the engagement of older adults in activities fostering their inclusion and participation, and the use of their background knowledge acquired from courses and workshops. Thus, the older adult educational position is redefined: it runs from the traditional student position to a more active and autonomous, of knowledge co-production and a co-management position that allows their participation and insertion in different projects, exercising new social roles through service-learning (Yuni 2010). These experiences represent a new conception of learning as personal and social transformation, along with education as a process of re-creation, and production of socially meaningful knowledge.

2.3.2 Problematic Issues Affecting the Sustainability of Older Adult Education

Argentine experiences of non-formal older adult education face many limitations, i.e. external funding, whose dependence is likely to affect the sustainability of OAs education. Many organizations finance their actions through the contribution of the aged themselves or through external state subsidies. However, UPAMI undergoes greater dependence since it covers its overall functioning. Since activities and courses are paid, a social selection of demands for non-formal older adult education is made; most of them belong to middle and high classes. It seems, then, that older adults' educational activities answer to the needs and hopes of groups of best socio-economic and educational position, with a lifestyle related to studying and intellectual activity.

Institutional level undergoes a relative degree of autonomy in the management of older adults' activities. In the case of the PUAM, its influence is felt on the different areas that are conducted by management teams designated by school governing areas or by the rector's office. As far as the UPAMI programme, management is shared by university and local authorities in charge of the social service organization (PAMI). Academic management is led by universities, but the financing, organizational and operational leadership is shared by both institutions. A further difficulty is seen in the adaptation of offers to local contexts and each university's particular features.

Older adults' involvement in the educational management renders good institutional practices (Formosa 2005; Yuni 2010b). But Argentine university experiences are influenced by the difficulties of political socialization that contemporary generations of older adults have (Yuni 1997). Nevertheless, PUAM has been trying to

involve older adults in co-managing Student Centers, Students' Associations and/or Commissions. Though UATEs are characterized by their self-management, older adults have low participation, decisions are made by the commissions who organize these experiences. Meanwhile, in UPAMI universities, these developments are not yet noticed, as the institutional logic characterizes older adults as beneficiaries of options provided by the social service. Finally, the question of the technical, professional and academic profile of the teachers hosting older adults' education experiences is an issue that has not been properly considered in our country (Yuni and Urbano 2008a, b). Sometimes, universities are short of teachers, in their staff, for some specific areas or subjects, so they have to recruit them from outside the institution. Whereas in UATE, hosts of courses or workshops are usually retired secondary school teachers or professionals who are related to the courses' subjects. As to the hosts and teachers' training, they have low background in gerontological issues.

2.4 Future Challenges

One of the main challenges, faced by educational experiences in Argentina, is to keep older adults' identity features as formative activities oriented to personal development. They are often based on intergenerational interaction, social integration, and participants' contribution.

The challenge for universities is the preservation of academic quality on scientific grounds, articulated with the production of knowledge on aged and aging and its transference to the community. Therefore, a further objective for the future is to keep the condition of a proper university educational activity. Institutional identity is questioned as a dynamic process that is continuously reconstructed and redefined. Besides, educational experiences with older adults have contributed to the formation of the Argentine gerontagogical tradition during over 25 years. Systematization of experiences and model are also part of the nature of institutional responses to contextual demands of OAs' education.

A comparative institutional evaluation indicates that, from a gerontagogical perspective, all involved sectors should advance in the formulation of a set of basic criteria promoting the design, development, and execution of systematic and integral educational actions. Agreements made between institutions may strengthen experiences as well as the sustainability of medium and long term programmes.

Besides, educational experiences with older adults in Argentina will have to face further challenges required by quantitative and qualitative changes of the aging population. As life expectancy increases, particularly in urbanized areas, opportunity expansions and education access will require continuous actions in revising and re-evaluating educational offers. Socio-cultural diversity and older adults' life conditions require educational institutions a re-evaluation of the relevance of activities and strategies devised. Though models satisfy educational demands of the middle class, older adults' alphabetization and job training are not being carefully considered. Future requirements from universities include: (i) older adult's need of

accessing professional and technical careers, not only to extension courses; and (ii), the development of educational alternatives based on updated information, e-learning, and an integration into this digital revolution. Another challenge is to face the diversification of educational offers recognizing heterogeneity and diversity of older adults and their life conditions. Courses generally have a female bias, since over 90 % of students are women – thus, it is necessary to design alternatives addressed to men.

Political-educational orientation of university experiences with older adults, also face challenges, mainly defending the essence of older adults as active and productive subjects. Older adults' education is given full possibilities of intellectual growth as agents of social change and transformation. Teachers' training is very important to conduct older adults' educational activities; it is necessary, then, to find the adequate profile of qualification. Besides, an educational gerontology programme could be designed for those in charge of courses and workshops to strengthen inter-institutional networks. Finally, the production of scientific knowledge gained by these experiences must be urgently systematized. It is crucial to overcome the lack of systematic and reliable information, because this drawback makes it difficult to reconstruct the national experiences.

References

- CEPAL. (2009). *El envejecimiento y las personas de edad. Indicadores socio-demográficos para América Latina y El Caribe*. CELADE, Naciones Unidas, Santiago de Chile.
- Cruz, A., & Pérez, L. (2006). *Envejecer ayudando. Envejecer aprendiendo. Adultos mayores en Uruguay: Actores del voluntariado y del servicio cívico*. Montevideo: Publicación del Instituto de Comunicación y Desarrollo (ICD).
- Erikson, E., & Erikson, J. (2000). *El ciclo vital completado*. México: Paidós.
- Formosa, M. (2005). Feminism and critical educational gerontology: An agenda for good practice. *Ageing International*, 30(4), 396–411.
- Hübner, S. (1998). El compromiso de la universidad con la tercera edad. *International Journal of Third Age Learning International Studies*, 8, 106–110.
- Kotre, J. (2006). *Outliving the self. How to live on in future generations*. New York/London: W.W. Norton & Cía.
- Lirio, J., Alonso, D., & Herranz, I. (2008). *Envejecer participando*. Madrid/Buenos Aires: Miño y Dávila.
- Orte, C. (Ed.). (2006). *El aprendizaje a lo largo de toda la vida. Los programas universitarios de mayores*. Madrid: Dykinson.
- Petriz, G. (2003). Educación permanente en la universidad, evaluación del proceso enseñanza-aprendizaje. In G. Petriz (Ed.), *Nuevas dimensiones del envejecer* (pp. 111–125). Buenos Aires: Universidad Nacional de La Plata.
- Puiggrós, A. (1994). *Imperialismo, educación y neoliberalismo en América Latina*. Paidós: Buenos Aires.
- Red UTE. (2008). Entrevista a Yolanda Darrieux. *Portal do Envelhecimento*. Bulletin 1, 28 Jan 2008.
- Rodríguez, L. (1997). Pedagogía de la liberación y educación de adultos. In A. Puiggrós (Ed.), *Dictaduras y utopías en la historia reciente de la educación Argentina [1955–1983]* (pp. 289–319). Buenos Aires: Galerna.

- Rodríguez, L. (2009). *La educación de adultos en la historia reciente de América Latina y el Caribe*. In P. L. Moreno Martínez, & C. Navarro García (Eds.), *Perspectivas históricas de la educación de personas adultas* 3(1), 64–82.
- Ruiz, M., Scipioni, A., & Lentini, D. (2008). Aprendizaje en la vejez e imaginario social. *Revista Fundamentos en Humanidades*, 17(1), 221–233.
- Urbano, C. (2010). *Resignificación identitaria de adultos mayores en dispositivos universitarios de Educación no formal*. Catamarca: Unpublished Ph.D. thesis presented to the Faculty of Humanities, Catamarca: National University of Catamarca.
- Urbano, C., & Yuni, J. (2005). *Psicología del desarrollo. Enfoques y perspectivas del Curso Vital*. Córdoba: Brujas.
- Urbano, C., & Yuni, J. (2013a). Envejecimiento activo y dispositivos Socio-culturales ¿una nueva forma de normativizar los modos de envejecer? *Revista Publicatio*, 21(2), 259–270.
- Urbano, C., & Yuni, J. (2013b). Aprender para un envejecimiento activo: Retos para las prácticas educativas con personas mayores. In J. Lirio (Ed.), *Gerontología social y envejecimiento activo* (pp. 118–139). Madrid: Tilia.
- Yuni, J. (1996). Aprender en la Tercera Edad: una respuesta de múltiples sentidos frente al problema de la distancia socio-cultural. *Talis: Third Age Learning International Studies*. No 7. Toulouse, Francia, 13, 201–208.
- Yuni, J. (1997). Educación de adultos mayores y diversidad: aportes y desafíos para la integración. In J. G. Castaño (Ed.), *Educación y exclusión* (pp. 173–183). Laboratorio de Estudios Interculturales. Colección de Estudios Multiculturales. Granada: Universidad de Granada.
- Yuni, J. (2000). El mito del eterno retorno: Educación, subjetividad y mayores. In S. Duschavsky (Ed.), *Tutelados y asistidos* (pp. 187–249). Buenos Aires: Ed. Paidós.
- Yuni, J. (2003). Educación de Adultos Mayores en Latinoamérica: situación y contribuciones al debate gerontagógico. In J. Sáez Carreras (Ed.), *Educación y aprendizaje en las personas mayores* (pp. 121–134). Madrid: Dykinson.
- Yuni, J. (2006). Envejecimiento y cambio cultural. Tramas y configuraciones emergentes. En AAVV, *Ver y Vivir la Ancianidad: hacia el cambio cultural*. Buenos Aires: Fundación Navarro Viola.
- Yuni, J. (2009). *Notas para reflexionar sobre los enfoques curriculares en la educación de personas mayores*. Actas del III Congreso Iberoamericano de Experiencias Universitarias de Adultos Mayores. San José: Universidad De Costa Rica.
- Yuni, J. (2010). *'Buenas prácticas' institucionales de empoderamiento de personas mayores en el espacio educativo*. Actas del Simposio Internacional REIACTIS. Santiago: Universidad Católica de Chile.
- Yuni, J. (2011). *Recorridos, limitaciones y posibilidades de las experiencias de educación no formal universitaria en Argentina*. Actas del IV Congreso Iberoamericano de Universidades para Mayores. Alicante: Universidad de Alicante-AEPUM.
- Yuni, J., & Urbano, C. (2005). *Educación de adultos mayores. Teoría, investigación e intervenciones*. Córdoba: Brujas.
- Yuni, J., & Urbano, C. (2006a). La educación como factor de oportunidad para el desarrollo de las personas mayores. In J. Lirio & D. Alonso (Eds.), *Mayores activos: Teorías, experiencias y reflexiones en torno a la participación* (pp. 87–118). Madrid: Ed. Dykinson.
- Yuni, J., & Urbano, C. (2006b). *Modelos organizacionales de programas Universitarios de adultos mayores: Situación y perspectivas críticas*. In Proceedings of the II Congreso Nacional de Extensión Universitaria. Mar del Plata, Agosto, pp. 379–383.
- Yuni, J., & Urbano, C. (2008a). Condiciones y capacidades de los educadores de adultos mayores: la visión de los participantes. *Revista Argentina de Sociología*, 6(10), 184–198.
- Yuni, J., & Urbano, C. (2008b). Cartografía de experiencias educativas con Personas Mayores en el ámbito latinoamericano. *Revista Electrónica Palabras Mayores*, 1, 3–26 (Facultad de Letras y Ciencias Humanas, Pontificia Universidad Católica del Perú).

- Yuni, J., & Urbano, C. (2010). Reflexiones sobre Generatividad y Compromiso. *Revista Electrónica Palabras Mayores*, 5, 68–85. (Facultad de Letras y Ciencias Humanas. Pontificia Universidad Católica del Perú).
- Yuni, J., & Urbano, C. (2013). The Cuban model for higher education of older adults. *Journal of Educational Gerontology*, 40(10), 715–722 (Published online September 2013).
- Yuni, J., & Urbano, C. (2014). Transition times in adult education in Argentina: A historical-institutional perspective. In B. Käpplinger & S. Robbak (Eds.), *International anthology in pedagogy, andragogy, and gerontagogy* (pp. 103–119). Berlin: Peter Lang.
- Zolotow, D. (2004). *Devenires de la ancianidad*. Buenos Aires: Lumen Humanitas.

Chapter 3

Australia

Barry Golding and Helen Kimberley

In the later years of life in Australia, after commitment to paid work or family responsibilities declines as life's primary motivating factors, learning occupies a different life space and purpose from learning in previous life stages. While learning to cope with the expected and unexpected events in later life is known from research elsewhere to be increasingly important (Cooper et al. 2010; Schuller and Watson 2009), the opportunities and places in Australia to learn formally and informally have been decreasing (Golding and Foley 2011). Our chapter argues that spaces for and purposes of older adult learning are less reflected upon, both by older adults themselves, by the wider Australian society and particularly by policy makers and governments in Australia. The prevailing discourse is more about costs of caring than opportunities during ageing.

Learning in later life in Australia is certainly less well researched and understood in comparison with the magnitude and urgency of the contemporary research effort directed toward learning during childhood, youth and the working years. This reflects in part government obsession with productivity, predominantly economically defined, but also prevailing social attitudes to ageing and the stereotypical but outmoded notion about decline and deficit in later life. Perhaps we should not be surprised then that policy and resources for later life learning are scarce and fall almost entirely outside the purview of government education policy. The single exception was the small Productive Ageing through Community Education Program established in 2012 but abolished in November 2013 by the new Coalition

B. Golding (✉)

Faculty of Education and Arts, Federation University Australia, Ballarat, VIC, Australia

e-mail: b.golding@federation.edu.au

H. Kimberley

Research and Policy Centre, Brotherhood of St Laurence, Melbourne, VIC, Australia

School of Social and Political Science, University of Melbourne, Melbourne, VIC, Australia

e-mail: hkimberley@bsl.org.au

Government together with the Advisory Panel on Positive Ageing. Even the newly released *Blueprint for an Ageing Australia* contains no reference to later life learning (Percapita 2014).

Golding and Foley (2011) summarised the recent and ongoing neglect and potential of adult and community education (ACE) in the Australian community, highlighting the ‘lack of ACE funding and in turn ACE provision for members of the community that are its most vulnerable’ (p. 66). This section of the community includes older and Indigenous Australians as well as migrants and refugees for whom English is a second language. With population ageing, particularly in rural and regional communities, and age discrimination, it also includes a significant number of older people withdrawn from the workforce as well as retirees older than age 65.

The government has complained loudly about the cost of *Caring for Older Australians* (Productivity Commission 2011, 2013) and the risk of older people ‘crippling the Australian economy’ (*The Australian*, 22 Nov 2013). While it has factored in an increase in the Australian retirement age to 67 years, it has been silent about the many known benefits and opportunities for ‘helping older people maintain the best possible mental capital, and so preserve their independence and wellbeing, both for their own benefit, and also to minimise the need for support’ (Kirkwood et al. 2010, p. 7). What our chapter highlights, best exemplified by the Australian (and now international) community men’s shed movement (Golding et al. 2007; Flood and Blair 2013), is the other challenge of ensuring ‘that the considerable resource which older people offer ... is recognised and valued by society’ (Kirkwood et al. 2010, p. 8).

The term ‘later life’ is a tenuous and contentious concept of the stage of life that succeeds middle age, whenever that might be. Instrumentally, entry to later life is usually determined by governments as the age of entitlement to or exclusion from various financial supports and services, such as the Australian Age Pension available currently at age 65. Beyond this there is a diversity of views and no clear agreement about the chronological age at which later life begins. With growing expectations of living a further 20–40 years beyond one’s working life, what is incontrovertible is that later life in Australia often encompasses the equivalent of two generations and that older adults now have to contend for much longer with living in a world in which complexity and turbulence have come to equal steady state. While this presents challenges for all older adults, it is particularly problematic for those who are disadvantaged, especially by social isolation.

There is need to reflect more deeply on learning in later life in Australia to raise its value and enhance its legitimacy. To this end, we first scrutinise a number of key ideas. What is the role of the many forms of learning in later life? What gives meaning to older adults’ lives? What is the later life project, individually and communally? From there we can start to explore how and in what contexts learning adds value to the lives of older Australian adults (their human capital), as well as to the communities and the society they live in (their social and economic capital).

3.1 Who Are Australia's Older Adult Learners?

While some older Australian adults, usually the more affluent and better educated, may seek learning opportunities for their intrinsic value, consciously 'improving their minds', protecting themselves from cognitive decline or seeking self-actualisation through education programmes such as continuing education in universities, U3A or other adult education providers, it appears that overall, very small numbers participate in learning programmes. Data from the 2006 Australian Census indicate that the number of adults aged over 55 who participated in formal or informal learning in 2006 was very small (48,175 or 1 %) (Kimberley and Simons 2009, p. 14).

However, evidence from data is inconclusive, in part because of insufficient interest from policy makers in even surveying participation in adult education after the age of 64. For example, the first national survey in Australia to include informal learning sought responses from all persons in the age range 15–64 but included those age 65–74 only if they were participating in the workforce (ABS 2009). While U3A has a high profile among policy analysts, the plethora of programmes offered by the many hundreds of adult education centres, community colleges and neighbourhood houses and learning centres, and the 1000 men's sheds across Australia, is largely ignored.

On this narrowly defined 'adult learning' evidence, one might assume that very few older Australians participate in adult learning. If, however, adult learning is conceptualised less narrowly, data shows that over 1.5 million community-dwelling Australian adults aged 65 years and over (66 %) were actively involved in a social or support group in the 12 months before the 2006 General Social Survey, although the proportion declines with age to 43 % of people aged 85 and over (AIHW 2013, pp. 31–32).

3.2 What Motivates Older Adults to Learn?

Later life is qualitatively and quantitatively different from the parts of life that have preceded it. In examining how age shapes our internal imagination, Biggs and Lowenstein (2011) argue that with age comes a shift in centrality of concerns; from social achievement and acceptance, for example, to more existential matters like personal coherence and completeness (such as time, health, death, impermanence, contingency, finitude). This reflects Jung's distinction between the existential projects of the first and second halves of life (Biggs and Lowenstein 2011, p. 25) and the structural models of human development theorists such as Erikson (1959), Maslow (1954), and Kohlberg (1981), all of whom postulate a stage of self-actualisation in one form or another. More recently, Tornstam (2005) has argued that the shifts of perspective in the later life project enable gero-transcendence.

Later life then embodies a quest for meaning which suggests that adults continue to develop throughout the whole of life. Learning does not suddenly stop before life ends. As Carr et al. (2013) found in their recent study of the meanings of a long life, older adults speak of feeling young inside, about desire and aspiration, and about growth and development and the future, their own and that of others (Carr et al. 2013, p. 15).

... counter-narratives, narratives that tell a different story about older age than what we are used to. Such stories counter the stereotype of inactive older adults ruminating about the past. They suggest also that older adults think about the future, their own and that of others.

3.3 What Do Older Adults Want to Learn?

If these ideas help to explain perceptions of later life and its projects, it must not be forgotten that it is the practical experience of living from day to day that provides the opportunities to survive, learn and flourish in life. The capabilities approach of Sen (1999) is concerned to understand quality of life on the basis of multidimensional variables rather than the economic measures traditionally used to measure disadvantage and poverty. Premised on the notion that adults have the right to live a life they have reason to value, Sen argues that they should have the capabilities to be and do what for them will constitute such a life, and that societal institutions should ensure the availability of these opportunities (Sen 1999, p. 293).

In this context, a recent survey of users of Brotherhood of St Laurence aged services asked what they value in life. The most highly valued capabilities nominated by respondents were led by health, safety and ‘making my own decisions’ followed closely by ‘being well informed, the place where I live, my independence, my family and feeling respected’ (Kimberley et al. 2012, p. 26). These Australian findings are consistent with Field’s findings that adults ‘value their health, their social connections (including family) and their ability to contribute to the wider community’ (Field 2009, p. 5) as well as their freedom and ability to shape their own destinies (agency) and have implications for older adults’ wellbeing and their learning concerns.

Fundamental to these concerns is the possession of ‘knowhow’, the knowledge and practical skills for its application. To flourish in contemporary society adults need to understand the institutions of society, their systems and processes, that impact directly or indirectly on their lives both day-to-day and in the longer term. In Australia the levels of competence needed in the basic literacies, prose, document, problem-solving and health are very low among most older adults (OECD 1997) as are financial and digital knowhow. These denote poor prospects for their ability to manage the complexity inherent in sustaining their human rights, their health and wellbeing, their financial affairs, their social connections, their civic responsibilities,

their communication tools, their accommodation needs, and their currency with evolving technologies.

Schuller and Watson (2009, p. 172) suggest that during each of three different stages of life (young people, adults, older people), the skills people need are differently focused. They cite overcoming the risk of social isolation, staying healthy and remaining independent as core. However, as in many neat schemas, it classifies other important life matters as belonging to the other two stages as though young people's interests such as 'develop social networks' and 'gain new knowledge and networks' or those of adults such as 'look after their families' or 'save time, money, inconvenience' are no longer relevant to later life.

3.4 How Do Older Adults Want to Learn?

In the Brotherhood of St Laurence Australian capabilities survey it is interesting to note that while respondents rated 'being well-informed' and 'making my own decisions' at the top of their rankings, fewer than 50 % nominated 'learning new things' as among what they most valued in life (Kimberley et al. 2012, p. 26). This disjunction between the need for knowledge and skills and the notion of 'learning' suggests negative associations. Whether or not that is so, it is evident that the vast majority of older Australians spurn existing structured educational programmes, not because they don't need to learn, but because what is on offer is of insufficient interest or its modes of delivery are not congenial to them.

Nevertheless, it is formal learning that in most developed nations like Australia is given privilege and status. Formal learning is conventionally regarded as organised learning that involves curriculum, assessment and accreditation. By comparison, non-formal learning is organised, but with less emphasis on curriculum, little or no assessment and no accreditation, while informal learning is usually understood as all other types of learning (ABS 2009). But a closer analysis of informal learning indicates complexity and value beyond conventional attribution. For example, Schugurensky's (2000) three types of informal learning aptly describe older adults' learning preferences.

Self-directed learning refers to 'learning projects' undertaken by individuals (alone or as part of a group) without the assistance of an 'educator'. It is both intentional and conscious. (p. 3).

Incidental learning refers to learning experiences that occur when the learner did not have any previous intention of learning something out of that experience, but after the experience she or he becomes aware that some learning has taken place. Thus, it is unintentional but conscious. (pp. 3–4)

Socialization (also referred to as tacit learning) refers to the internalization of values, attitudes, behaviours, skills, etc. that occur during everyday life. Not only we have no a priori intention of acquiring them, but we are not aware that we learned something. (p. 4).

The fundamental and arguably radical differences between structured and informal learning can be seen to revolve around the greatly reduced role of the teacher/

trainer and learning organisation, the relative invisibility of the learning processes and curriculum, and the greatly enhanced roles for the learner and the wider community. The paradox here is, to take Kral and Schwab's (2012, p. 101) learning:

... is more likely to grow if [learning] itself is not over emphasised and adults' life projects are the focus of the activity. ... [This] call to emphasise learning over formal teaching and teaching raises some serious questions for policy makers. The successful learning we observed was often inconspicuous or invisible. ... This suggests the need to acknowledge 'soft outcomes' such as gains in self-esteem, personal development, confidence, motivation, collaboration and problem solving (Kral and Schwab 2012, p. 101).

3.5 Older Adults' Learning and Wellbeing

The potential gains associated with learning by older adults in Australia extend well beyond the individual to include family and community. We live in a world where understanding ourselves as always being in relationship is important, and where *instrumental learning* (learning facts and figures without full understandings of their meaningfulness) is becoming less important than *communicative learning* (Habermas 1984). Learning (and teaching) at its best is a relational act where the environment invites us to want to be there, where we may possibly experience, learn and give back more than we expected (Southern 2007, p. 332), including to the community.

However, social isolation is widespread in Australia. Except in major cities and inner suburbs, the vast majority of the population lives in suburbs and non-urban locations that are far from age-friendly, poorly served as they are by transport and amenities. The preference of most older Australians to live out their lives in their own homes and the policies that support ageing in place, including the provision of home care services, detach them from family, friends and community and undermine the sorts of socialisation imperative to informal learning and wellbeing.

As a consequence of recent and major learning and wellbeing studies (Cooper et al. 2010; Schuller and Watson 2009), 'we now know much more about the impact of adult learning on health (including mental health), social participation, earnings and sense of agency' (Field 2009, p. 10). These understandings about wellbeing are supported by the World Health Organisation (WHO 2003) social determinants of health.

Lindstrom argues for the importance of 'sense of coherence',

..., finding everyday life meaningful, having well-functioning social networks, being in touch with one's inner life (psychological wellbeing), having clear coordinates in life (such as having an existential position) are all conducive to a strong SOC [sense of coherence] and subsequently good health, wellbeing and quality of life. (Lindstrom 2010, p. 9)

He points to the stronger correlates between SOC and mental health and perceived wellbeing than to the objective physical status of health and that 'rather surprisingly', psycho-emotional and mental strengths seem to overrule socio-economic

and physical conditions in life. He argues that ‘... it should be possible to systematically organize structures in society in ways that are conducive to health in a life-course perspective’ (Lindstrom 2010, p. 9).

Such thinking supports our notion that the value of learning goes well beyond the individual. Learning also builds networks, trust, reciprocity (give and take) and social connections, that, as Field (2005, p. 1) notes, help adults to advance their interests by cooperating with others.

3.6 Third Places and Their Particular Importance for Older Australian Adults

‘Salutogenesis’, a term coined by Aaron Antonovsky (Lindstrom 2010, p. 1) in the field of medical sociology, focuses on factors that support human health and wellbeing, rather than on factors that cause disease. Salutogenesis is particularly applicable to informal community settings in Australia where community inclusion and connection are much more important to the quality of later life than vocational skills for paid work. Identification of the mechanisms that are important in and between key health promoting settings (such as family, learning institutions, workplaces, health care institutions, leisure time arenas) is important for the overall healthy process.

Langworthy and Howard (n.d., p. 27) consider that an adult’s first place is normally the home, the second is usually the workplace, with the ‘third place’ defining ‘a social space where it is possible to have an informal meeting, chat to a friend or just hang out’. Older adults tend to congregate in these third places (Oldenberg 1999), usually public places that host the regular, voluntary, informal and happily anticipated gatherings beyond the realms of home and work.

Golding et al. (2014) make a case for more consideration of older men learning through life, in third places which are social, local and situated. Men’s sheds in community settings are an excellent ‘third place’ example, with significant learning, health and wellbeing benefits now demonstrated in Australia (Golding et al. 2007, 2014; Flood and Blair 2013) and in international meta-analyses (Milligan et al. 2013). However, there are several risks in arguing the case for third places for older adults and in using such a model as the basis for enhancing their learning and wellbeing by supporting community agency and capability. There is the risk that increased privatization and marketization in a restructured welfare state increasingly transfer responsibility and risk from the society to the individual (Biggs and Kimberley 2013). Levitas (2000) gets to the core of the problem when she argues that there is a risk that the community might be become responsible for mopping up:

... the ill effects of the market and to provide the conditions for its continued operation, while the costs of this are borne by individuals rather than the state (Levitas 2000, p. 194).

3.7 Learning Through Community Contexts

McGivney's (1999) research in *Informal Learning in the Community* provides a strong and complementary framework for analysing, learning and wellbeing in community settings. McGivney (1999, pp. v–vi) draws four main conclusions:

- first, that 'informal learning takes place in a huge variety of settings';
- second, that 'the location of learning is extremely important, often more so than its actual focus';
- third, that 'community-based learning plays a critical role in widening participation among adults who are educationally, economically and socially disadvantaged';
- fourth, the conclusion relates to difficulties of measurement of informal learning in community settings, leading to related difficulties with estimating its impact.

It is the second conclusion which most rings true in relation to findings about older adults' learning in adult and community education settings.

Recent Australian research has shown a direct link between participation in community organisations, learning and wellbeing (NSA 2013). The rapid growth and spread of the men's shed movement in Australia and internationally is the most recent example of other communitarian social movements that aimed to meet the needs of the 'common person' in ways that top down, institutional educational initiatives could not. Most of these movements have had particular benefits for disadvantaged groups, including families, children, women and men. In Australia, forerunners to the community men's sheds movement are the neighbourhood houses and learning centres (which appeal more to women) and before them mechanics institutes, whose foci were less about formal education and more about popular education and 'enlightenment' of those previously not connected through learning.

3.8 Conclusion

Our chapter is premised on positive findings of research that show that the subjective wellbeing of adults depends not so much on their health as on a range of contextual and social factors, among which social engagement plays an important role in Australia. Our fundamental conclusion is that learning and social engagement can be mutually reinforcing at any age, and that health and wellbeing are positive outcomes of both.

Older Australians with limited access to learning that suits their needs, preferences, pedagogies, locations and socio-cultural contexts are more often those who have been subject to adversities earlier in life. Their wellbeing (mental and physical) is more likely to already be diminished by risks accumulated earlier in life with obvious adverse effects on partners, families and children. Despite remarkable resilience, many are also less prone to recover because of their more limited access to

the resources, networks and capital (social, mental, physical, educational, family, community, skills and qualifications).

In 2009, the Australian Prime Minister released a visionary statement on *Transforming Learning and the Transmission of Knowledge* (PMSEIC 2009) recognising that ‘Many of the assumptions regarding adult learning are consistent with the natural demands of informal learning’ (p. 29), and that:

... much adult learning occurs at transitional stages in the lifespan, when new challenges such as entering the workforce, starting a family or retirement, require a new set of skills and, in many cases, some rethinking of a person’s self-concept.

The peak adult education body, Adult Learning Australia, is dedicated to lifelong and lifewide learning. Increasing numbers of formal international and national policy statements as well as research findings are now recognising the value of informal learning. What is missing in Australia is a national policy commitment of its value to older Australians.

References

- ABS: Australian Bureau of Statistics. (2009). *Education and training experience Australia* (Cat. No. 6278.0). Canberra: ABS.
- AIHW: Australian Institute of Health and Welfare. (2013). *Australia’s welfare*. <http://www.aihw.gov.au/publication-detail/?id=60129543825>. Accessed 22 Nov 2013.
- Biggs, S., & Kimberley, H. (2013). Adult ageing and social policy: New risks to identity. *Social Policy and Society* 1–11. doi:10.1017/S1474746412000656, Published online: 02 January 2013. http://journals.cambridge.org/abstract_S1474746412000656/
- Biggs, S., & Lowenstein, A. (2011). *Generational intelligence: A critical approach to age relations*. Abingdon: Routledge.
- Carr, A., Kimberley, H., & Biggs, S. (2013). *Looking back, looking forward: Interpreting personal stories in later life*. Fitzroy: Brotherhood of St Laurence.
- Cooper, C., Field, J., Goswami, U., Jenkins, R., & Sahakian, B. (2010). *Mental capital and wellbeing*. Chichester: Wiley-Blackwell.
- Erikson, E. (1959). *Identity and the life cycle*. New York: International Universities Press.
- Field, J. (2005). Social capital and lifelong learning. *The Encyclopedia of Informal Education*. www.infed.org/lifelonglearning/social_capital_and_lifelong_learning.htm. Accessed 3 June 2005.
- Field, J. (2009). *Wellbeing and happiness* (Inquiry into the Future of Lifelong Learning, Thematic Paper 4). Leicester: NIACE.
- Flood, P., & Blair, S. (2013). *Men’s sheds in Australia: Effects on physical health and mental wellbeing*, Report for beyondblue. Melbourne: beyondblue.
- Golding, B., & Foley, A. (2011). All over, red rover? The neglect and potential of Australian adult education in the community. *Australian Journal of Adult Learning*, 51, Special Edition, 57–71.
- Golding, B., Brown, M., Foley, A., Harvey, J., & Gleeson, L. (2007). *Men’s sheds in Australia: Learning through community contexts*. Adelaide: NCVER.
- Golding, B., Mark, R., & Foley, A. (Eds.). (2014). *Men learning through life*. Leicester: NIACE.
- Habermas, J. (1984). *The theory of communicative action. Vol. 1: Reason and the rationalisation of society*. Boston: Beacon.
- Kimberley, H., & Simons, B. (2009). *The Brotherhood’s social barometer: Living the second fifty years*. Fitzroy: Brotherhood of St Laurence.

- Kimberley, H., Gruhn, R., & Huggins, S. (2012). *Valuing capabilities: The capability approach and Brotherhood of St Laurence aged services*. Fitzroy: Brotherhood of St Laurence.
- Kirkwood, T., Bond, J., May, C., McKeith, I., & Teh, M. (2010). Mental capital and wellbeing through life: Future challenges. In C. Cooper, J. Field, U. Goswami, R. Jenkins, & B. Sahakian (Eds.), *Mental capital and wellbeing* (pp. 3–53). Chichester: Wiley-Blackwell.
- Kohlberg, L. (1981). *The philosophy of moral development*. San Francisco: Harper & Row.
- Kral, I., & Schwab, R. (2012). *Learning spaces: Youth, remote literacy and new media in remote indigenous Australia*. Canberra: ANU Press.
- Langworthy, A., & Howard, J. (n.d.). *Where are the third places: Recreational alternatives to gambling?* Lilydale: Centre for Regional Development.
- Levitas, R. (2000). What is social exclusion? In D. Gordon & P. Townsend (Eds.), *Breadline Europe* (pp. 357–383). Bristol: Policy Press.
- Lindstrom, B. (2010). Salutogenesis: An introduction, drawn from Lindström B. & Eriksson, M., *The Hitchhiker's guide to Salutogenesis*, Folkhälsan, Health Promotion Research Report 2010: 2. http://www.centrelearoback.org/assets/PDF/04_activites/clr-GCPB121122-Lindstrom_pub_introsalutogenesis.pdf. Accessed 13 Nov 2013.
- Maslow, A. (1954). *Motivation and personality*. New York: Harper.
- McGivney, V. (1999). *Informal learning in the community: A trigger for change and development*. Leicester: NIACE.
- Milligan, C., Dowrick, C., Payne, S., Hanratty, B., et al. (2013). *Men's sheds and other gendered interventions for older men: A systematic review and scoping of the evidence base* (Report for the Liverpool-Lancaster Collaborative (LiLaC) and Age UK). Lancaster: Lancaster University Centre for Ageing Research.
- NSA: National Seniors Australia. (2013). *Staying connected: Social engagement and wellbeing among mature age Australians*. Canberra: National Seniors Australia Productive Ageing Centre.
- OECD. (1997). *The International Adult Literacy Survey (IALS) data*, first available in 1997, OECD.
- Oldenberg, R. (1999). *The great good place: Cafés, coffee shops, bookstores, bars and other hang-outs at the heart of a community*. New York: Marlowe and Company.
- Percapita. (2014). *Blueprint for an ageing Australia*. http://www.percapita.org.au/_dbase_upl/BlueprintForAnAgeingAustralia.pdf. Accessed 19 Sept 2014.
- PMSEIC: Prime Minister's Science, Engineering and Innovation Council. (2009). *Transforming learning and the transmission of knowledge*. Canberra: Commonwealth of Australia.
- Productivity Commission. (2011, June 28). *Caring for older Australians, productivity commission inquiry report* (Vols. 1 & 2, Report No. 53).
- Productivity Commission. (2013, November 22). *An ageing Australia: Preparing for the future*. Productivity Commission Research Paper.
- Schugurensky, D. (2000). *The forms of informal learning: Towards a conceptualization of the field* (WALL Working Paper No. 19). Toronto Ontario Institute for Studies in Education of the University of Toronto.
- Schuller, T., & Watson, D. (2009). *Learning through life: Inquiry into the future of lifelong learning*. Leicester: NIACE.
- Sen, A. (1999). *Development as freedom*. Oxford: Oxford University Press.
- Southern, N. (2007). Mentoring for transformative learning: The importance of relationship in creating learning communities of care. *Journal of Transformative Education*, 5(4), 29–38.
- The Australian*. (2013). <http://www.theaustralian.com.au/national-affairs/raise-pension-age-to-70-or-greying-will-cripple-economy/story-fn59niix-1226765665672#sthash.um84A3fI.dpuf>. Accessed 22 Nov 2013.
- Tornstam, L. (2005). *Gerotranscendence: A developmental theory of positive aging*. New York: Springer Publishing Company.
- WHO: World Health Organisation. (2003). In R. Wilkinson & M. Marmot (Eds.), *The social determinants of health: The solid facts* (2nd ed.). Copenhagen: WHO.

Chapter 4

Austria

Franz Kolland and Anna Wanka

4.1 Adult Learning in Austria: History and Development

As in many other industrial nations Austria has experienced a great expansion in education since the 1960s. This educational expansion has taken place by means of an extended participation in education at practically all levels of the educational system. The sociologist of education Bettina Kraus (1996) explains this change in attitude towards education as follows: “the loss of personal possessions and the roof over one’s head in the course of the Second World War and the years directly following the war...and the notion of education as an increasingly more important vehicle of social advancement in a society which has, to all appearances, become more mobile” (ibid.: 120). The political authorities attempted to counteract the shortage of qualified labor and the lack of graduates from middle and upper schools which occurred at this time. The extension of the educational system was also meant to achieve a reduction in social, gender-specific and regional inequality for the participants in education.

In Austria the fundamental political decision in favor of the expansion of education is revealed in the School Law passed in 1962 (establishment of the upper school reform of the academic secondary schools with a substantial increase in the numbers of graduates, expansion of the secondary school system). Reforms such as the abolition of school fees, the provision of free schoolbooks and the expansion of schools in rural areas provided impulses in the direction of greater educational equality. This change must be seen in the political context of the Social Democratic reform era of Bruno Kreisky’s government in the 1970s.

F. Kolland (✉) • A. Wanka
Department of Sociology, University of Vienna, Vienna, Austria
e-mail: franz.kolland@univie.ac.at; anna.wanka@univie.ac.at

In the field of adult education decisive institutional changes first occurred in the 1950s and again in the 1970s, which to this day have shaped the field of organized life-long learning.

The Association of Austrian Adult Education Centers (VÖV) was founded in 1950.

All the Austrian adult education centers are members of this association. The adult education centers constitute the oldest and, at the same time, largest institution of adult education in Austria. They are largely self-financing (60 %), with the rest of the money deriving – in varying degrees – from provincial governments, local councils, the Federal Ministry (less than 5 %) and projects funded by the European Community. The 270 Austrian adult education centers view education as a learning process which continues throughout life and which comprehends the cognitive, affective and physical dimensions, in other words, the whole person. Its work is focused on the learners' needs and requirements, but also tries to make people aware of needs and requirements they might forget about in everyday life. [<http://www.vhs.or.at/61/>; 6-01-13]

In the 1950s the Association of Catholic Adult Education Institutions in Austria, the Association of Protestant Adult Education Institutions and the Association of (non-religious) Austrian Adult Education Institutions were also founded in the 1950s. They amalgamated in 1955 as the Ring of Austrian Adult Educational Institutions. In 1954 the Association of Austrian Education Centers was founded. Then, in 1972, the Conference for Adult Education (KEBÖ) was founded, an institution consisting of the providers of adult education (VHS, WIFI, BFI etc.) which had the task of distributing the state funds for adult education. Further umbrella organizations or providers of adult education which concentrated primarily for the acquisition of professional qualifications through further education and were also founded at this time were the Institute for Professional Advancement (BFI), the Further Education Institute of the Chamber of Commerce (WIFI) and the Rural Further Education Institute (Ländliche Fortbildungsinstitut – LFI). The education and further training of adult education teachers and librarians has been undertaken since 1974 by a Federal Institute for Adult Education especially founded for the purpose.

In the year 1981 the Principles of Developmental Planning for a Cooperative System of Adult Education in Austria were enacted at the political level with the aim of providing a comprehensive and need-based education for all groups of the population. This did not, however, enable the achievement of equality with schools and universities. From a financial point of view, in particular, the state funding for further adult education remained slight in comparison with the funds provided for school and university education.

In the last three decades a proliferation of institutional arrangements for life-long adult learning has taken place (Kolland 2005). What is meant by this is that apart from private providers who address their offers to older people above all in the fields of the new media and new technologies other organizations have also arisen whose field of action partly lies far outside the sphere of education. These include, for example, organizations providing assistance for the elderly and other social

organizations which have extended their traditional field of action to include education. To these must be added the offers made by organizations for senior citizens, the Churches, the communities and special interest groups. Among the organizations for senior citizens (Association of Senior Citizens, Association of Old Age Pensioners, Ring of Senior Citizens, Central Association of Old Age Pensioners, Green Old Age Pensioners) a distinction must be made between those which, on the basis of the Federal Law on Senior Citizens (BGBl. I N^o.84/1998), receive an annual, legally guaranteed funding according to their size, and those which do not as they are too small and have too few members. The former see themselves to a greater or lesser degree as service, counseling and information institutions and can make the corresponding offers, whereas the latter are characterized by a low level of institutionalization. The organizations with a large membership are also distinguished by the fact that in some of them education is institutionally anchored by means of an education officer.

The work of the Churches with senior citizens is characterized by an increasing internal differentiation (division of labour). What is meant by increasing (social) differentiation is that within the Churches several institutions offer the provision of education. Apart from the educational institutions specifically located within the Church (adult education centres etc.) there is also local work with old people, which often takes place in clubs, for example the pastoral care of the old and the activities of sub-organizations of the Churches (for example the Catholic Women's Movement).

In this proliferation of institutional arrangements one institution plays virtually no part in comparison with the situation in other European and non-European countries, namely the University of the Third Age (U3A). In this regard Austria is in a special situation as it makes practically no offers of this kind. The Austrian universities were opened up to older students in 1978 and were increasingly well frequented on account of the free access until 2001. This is probably the main reason why no autonomous U3As arose.

4.2 Participation

Nationwide statistical evaluation of adult education centers in Austria first began in 1950/51. Since then the number of courses offered has increased tenfold and the number of participants more than fivefold. Today, some 46,000 courses are offered at Austrian Adult Education Centers, attended by almost half a million participants. Statistically, the courses are divided into seven specialized areas. The greatest number of participants is to be found in the 'Body and Health' area of studies, which makes up more than 30 % of the total figure, followed by 'Languages' with 27 %. The number of people pursuing a 'Second Chance' adult education is also increasing. About 700 people are employed in the organization and administration of the Austrian Adult Education Centers, 200 of them in a pedagogical and planning capacity. Instruction is given by almost 20,000 course trainers.

Table 4.1 Education by older ages in Austria (2011/2012)

		45–54 years	55–64 years
AES 2006/07	Formal	1.2 %	0.4 %
	Non-formal	42.5 %	25.2 %
	Formal or non-formal	42.8 %	25.4 %
AES 2011/12	Formal	3.2 %	1.9 %
	Non-formal	47.7 %	35.2 %
	Formal or non-formal	48.8 %	35.7 %

Source: Adult Education Survey, own calculations

In the working year 2011/2012 the share of the age group 50–59 in the total numbers of participants at the adult education centers was 15.2 %, that of the age group 60–69 11.3 % and of the age group 70+ 5.4 %. In comparison to the corresponding age groups of the overall population the share of the participants in education of the age group 50–59 is slightly overrepresented, whereas the share of the participants of the age group 60–69 is roughly equivalent to the share of this group in the population as a whole. The 70+ group is strongly underrepresented. Their share in the overall population amounts to 12.6 %, but only 5.4 % attend the adult education centers.

Evidence on overall participations rates among Austrians aged 50 years and older are based on survey data (Eurostat 2013). According to the 2011/2012 Adult Education Survey (AES), 48.8 % of Austrians aged 45–54 years and 35.7 % aged 55–64 years have participated in either formal or non-formal education during the previous 12 months. These rates depict a slight increase among the age group 45–54 years (+6 %) and a strong increase among the age group 55–64 years (+10.3 %) compared to the AES 2006/07 (see Table 4.1). The persisting gap in participation rates between these two age groups is an effect of the low employment rates of the older age group.

A specific institution of learning in later life is the university. In Austria, senior adult studies are not considered a specific direction of study, but rather a category for administrative purposes. This category consists of all female students over 55 and all male students over 45. Since 1978 there was a remarkable increase of the total number of students with a peak of 4486 students in 2001 when tuition fees were implemented. The following years were marked by a decrease until 2006 and a anew increase. In 2012, 3968 senior students are studying at Austrian universities. The majority (60.2 %) are women with only slight changes within the last 30 years into the direction of more women.

The expansion in education has led overall to a longer duration of school education and hence to a prolongation of youth as a life phase. The improved qualification structure of the Austrian resident population is strongly determined by women. And this has resulted in an increased demand for places of work. Overall, the expansion of education is more the consequence of successively better trained cohorts and less the result of higher qualification within the cohorts. This means that the significance of further education in the middle and later life phases was less. This is also partly

the result of the relatively early retirement age in Austria in comparison with other European countries. Not so much was invested in qualification and further education in the middle life phase because the retirement age fell to under 60 in the 1990s.

Against the background of the early withdrawal from working life and the low quota of participation in adult education four ministries drew up in 2011 a *Strategy Programme for Lifelong Learning 2020 (Republik Österreich 2011)*. This strategy paper clearly points out that education and learning are not dependent on age and in Line of Action 9 it determines explicit goals for participation in education in later life. The aim is to achieve a participation quota of 12 % of the population group aged 60-plus by the end of the observation period in 2020. In order to achieve this goal measures will be developed and implemented on the qualification of teachers, low-threshold offers, community teaching, and offers of educational advice for older people.

4.3 Theoretical Perspectives and Key Concepts on Older Adult Learning

Nothing is more practical than a good theory! To a certain degree practice is socially embodied theory. Does this relationship also apply to the practice of life-long learning in old age? The answer is ambivalent. On the one hand educational practice is literally swamped with theoretically molded statements from research on the process of ageing. On the other hand, if educational theory concepts do not go beyond idealistic assumptions they remain remote from practice. In practical educational action the theory of activity is excessively followed up and the subjective and social contingencies accordingly neglected. The application of subject and participation oriented concepts in the further education of older people is very modest.

Activity is regarded as essential for growing old successfully (Rowe and Kahn 1997). A person who participates in educational activities and is physically active is in a better state of health and ultimately reveals a lower level of morbidity. Activity in the form of hustle and bustle, restlessness and a spirit of enterprise are thus not only signs of the Western lifestyle and economic success but also of long life expectancy. Calmness, slowness and contemplation are characteristic of non-European lifestyles and economic underdevelopment. The long dominant retirement orientation for old age has in the meantime come to be regarded as an inadequate option for action.

On the basis of empirical studies both the potential for activities during the process of ageing and the need for activating measures for the achievement of satisfaction in the late phase of life have been demonstrated (see Rowe and Kahn 1997). For the practice of education in later life this leads to a simple formula, namely activation. The activity theory stipulates, so to speak, that only active ageing is good ageing. The activity concept can be found in a fundamental policy paper of the World Health Organization (WHO), which expects that this concept will lead to a positive perception of ageing. Active ageing will enable people “to make full use of their potential and ensure enduring social participation” (WHO 2002-: 12). And in 2012, in the course of the European Year for Active Ageing, the need to further social and physical activity was also pointed out.

The activity theory emphasizes from the start the individual who is capable of shaping his own life. From the point of view of the individual activity means that a person can develop his capacities and achieve his personal developmental goal by his own efforts. Development is not 'programmed'. It can be promoted by will and effort. No sudden leap leads to the realm of freedom. Education is work, a concrete involvement with the conditions of individual and social existence. What is meant here by involvement is that activity, and specifically educational activity, must be understood as intentional action. It stems from the actor and results from motivation. It is distinguished from happenings and simple experiences which occur of their own accord. Accordingly, educational action in later life takes place in the context of life goals and the concrete results of actions. Whenever processes of development and growth gain a foothold and should then prevail over biological ageing as a process of loss, it is necessary to act. Room for maneuver must be created and utilized.

From this standpoint education and learning cannot happen by chance. This approach must, therefore, be differentiated from the concept of learning which defines learning as an informal, incidental activity. Informal learning only possesses learning potential but it is not learning as such and not at all education. Someone who incidentally acquires new knowledge or information when pursuing a hobby, working in an honorary capacity or carrying out other daily activities outside educational institutions may well claim "to have learned something", but this learning is scarcely an indication of self-reflection, increased judgmental competence or an expansion of the room for maneuver (Kolland and Ahmadi 2010).

For the fourth life age, which is characterized by increasing frailty and restricted powers of performance another kind of activity is proposed. In the fourth life age working activities no longer stand in the foreground, but the self-determined organization of life, which is maintained until increased frailty leads to a need for external care.

What is the role of education and education for later life in this process of activation and self-care? Education has the task of qualifying people and creating the competence needed for employability in old age, care-work and voluntary work. Its aims are the achievement of competitiveness, commitment and adaptive competence. Education should strengthen both the freedom to plan life and the social commitment of the individual. This means: life-long learning which is at once 'instrumentalized' and 'mancipated' (Alheit and Dausien 2002).

The instrumentalization of education for later life becomes practically visible when it is restricted, for example, to training functional memory performance or leads to civic commitment designed to fill gaps in the provision of social services by the state. But education in later life is also instrumentalized when it attempts to develop a learning culture directed towards self-steered and self-determined learning on the basis of theoretical approaches taken from adult education. What is expected as a result of learning is, namely, that older people should be able to organize their everyday life in a competent and self-controlled way. Subject-oriented approaches to adult education operate in a field of tension between self-liberation and self-discipline. Education can thus be understood as a regulative

technique which deprives older people of a legitimate right to be dysfunctional and culturally disengaged.

4.4 The Practice of Education for Later Life

In the 1960s and 1970s the practice of education for later life was primarily characterized by *charitable-custodial* features and addressed itself to old people predominantly in regard to their need for help and social integration. The task of learning was to help and to stabilize, and the practical work aimed at a vague kind of confirmative learning. Because this kind of learning did not involve the acquisition of specific knowledge clubs for senior citizens which offered counseling services and entertainment could also be regarded as places providing education. In a survey carried out in 1981 among the heads of clubs for senior citizens it became clear that the majority felt that their efforts should be primarily directed towards helping old people in mastering their life problems (Kolland 1984). The visitors to the clubs were mainly classified as needing care – an approach based on a deficit model of ageing. Subsequently activation programs began with the aim of maintaining and promoting individual competence. An *educative* approach moved into the foreground, which has spread widely in the health and prevention spheres up to the present day. Its message is that those who eat fruit and vegetables in the correct mixture, avoid salt and fat, and do not smoke will grow old, or, metaphorically speaking, will live forever. A comprehensive information package is offered and scarcely any function or part of the body is omitted. A changed attitude towards one's own body, a new awareness of health, the challenges of relearning and a preparatory/planning learning are propagated. The educative approach has been most clearly implemented since the 1980s in the 'preparation for old age, ageing and retirement'. Alongside the educative approach the socio-pedagogical perspective on education can be found which places education in the vicinity of community work. The special feature of this kind of educational practice is the *target group approach*. This attempts to take the special situation of a target group into account when creating learning programs. The experiences and the action perspectives of the persons concerned provide the starting point. At the end of a learning process the knowledge acquired ought to flow back into the daily actions of the target group (Mozaffari-Anari 2004). The constitutive feature of work with target groups is a perceived lack or disadvantage in a group which differs from other groups on account of certain characteristics. The target group approach is manifested in certain educational courses which are specifically addressed to older people (for example. English for Seniors).

Nowadays the effectiveness of such intervention approaches is at least disputed. There is doubt as to whether more activity leads to greater social interaction. It is rather the case that activation programs can create and reinforce the dependence and marginalization which they were originally designed to overcome. Activation takes place partly on a backstage involving insignificant socially and societally irrelevant activities and roles. In comparison to the older approaches *experiential learning* has

moved into the foreground of educational work (Kade 1998). Experiential learning aims to counteract the destruction of the past in an accelerating society which is only oriented on the present and loses all connections with the past. This biographical learning in a historical context enables people to draw lessons from the past in order to achieve, in an intergenerational fashion, a humane shaping of the future (utopia competence) which forms the basis for a visionary conduct of life in old age. In this context education for later life does not aim primarily to mediate knowledge and skills which permit a more effective and better performance, but allows the ageing the person to express his personal interests and concerns. In this approach educational work is ambivalently positioned between socio-pedagogical support and learning challenges. Education thus has the task of building on individual resources and potential, supporting the attempts of older people to recognize their own resources and to make use of them meaningfully in order to improve their life situation. Educational programs can be motivating, informative and orientating, but they also help to accompany old people in their endeavors to cope with fears and experiences in their contacts with unaccustomed social roles.

4.5 Inclusion and Exclusion

What are the requirements and constraints involved in the pursuit of lifelong learning? In the following we will take a closer look at participation rates of non-formal and informal learning on the basis of an empirical study for Austria. The question arises whether social inclusion/exclusion is a result of all forms of learning in old age or primarily of institutional learning. Do social status and one's personal learning biography influence educational participation in later life? Against the background of these prerequisites a representative empirical study was conducted in Austria in 2006 on learning activities in institutions and informal settings. For this purpose 504 persons aged 60-plus participated in computerized telephone interviews.

The majority of individuals participating in the survey belonged to the group of informal learners (67 %), followed by non-formal learners (17 %) and those who distance themselves from learning, the non-learners (16 %). In this study, participation in non-formal education was relatively high compared to other studies. The discrepancy can be partially explained by the type of questions asked, which prompted respondents to include church-related activities, activities organized by associations for senior citizens or private institutions. In sum, 17 % of all respondents had participated in courses or teaching courses within the last year.

Comparable studies on non-formal education in higher age groups (see Sommer et al. 2004; Schröder and Gilberg 2005; Dench and Regan 2000) have found a correlation between recent educational behavior and different socio-statistical variables such as gender, schooling or income. The present study has not found any gender-based differences in regard to non-formal education. In terms of age, differences were however observed that remained valid even after including interfering variables. Particularly the old-old respondents tend to distance themselves from educational initiatives. As much as 9 % of all respondents who had completed

elementary school and 34 % of all individuals who had earned higher degrees had attended courses within the last 12 months.

How relevant is the learning potential of daily activities? To what extent are individuals aged 60 and over engaged in informal learning? The data show that 67 % of older people learn either from daily activities, or informally. For 40 % of all respondents a more intensive learning activity was observed, implying that they had learned something from more than one of the daily activities assessed during the interview. Reading and computer related activities exhibit a comparably high learning potential. Performing such activities tends to promote learning for most people. 50 % of all viewers indicate having learned something from watching TV. In comparison, activities such as cooking, handicraft and health related activities show a lower learning potential. 'Dealing with a new technical device' is believed by most respondents (78 %) to be an activity (within the last 4 weeks) with a learning effect. This is followed by volunteering and frequenting cultural events, where 61 % indicated having learned something. A similar learning potential can be attributed to social activities. 57 % believe to have learned during encounters with friends and 53 % while spending time with their family. The lowest number of respondents claimed to have learned something during sport related activities (32 %).

In terms of informal learning it is particularly striking that this type of learning is found more frequently in men, and, furthermore, more often in younger individuals and the more highly educated. Regarding the highest level of education attained, it becomes obvious that more highly educated individuals tend to prefer non-formal learning, while their percentage is rather low among non-learners. Individuals who have only completed primary education tend to be among the informal learners and non-learners. They form only a small percentage of non-formal learners. Subjective health also appears to influence the choice of forms of learning. Individuals who tend to rate their health positively are often among the non-formal learners, but less frequently among the non-learners. The most significant result regarding informal learning indicates that no clear tendencies can be observed; informal learning is impacted by socio-demographic factors only to a lesser extent. This implies that older individuals who are disadvantaged in terms of education may learn from daily activities after all.

4.6 The Future of Adult Learning in Austria

The level of education and late life participation in education are determined by one's social background. Individuals who have only completed compulsory education tend to participate less frequently in educational measures in mid- or late life. Motivation to learn has often cooled down, partly due to structural factors that have led to early school drop-outs (income, gender specific stereotypes) and partly due to discouragement. As a result of the increasing overall level of education an increase in the participation of the elderly in education can also be expected. The situation remains problematic for older people with low education levels who are not

integrated into social networks. Lack of social integration results in twofold social exclusion; it causes loneliness and reduces participation in social activities, because the respective skills are lost as a result of a lack of learning opportunities.

New forms of educational provision are needed in the future to accommodate for the differentiation of later life. The strong individualistic view in the context of lifelong learning does not relieve institutions providing further education from their responsibility to provide resources and opportunities. However, the relation between the individual and the organization should be redefined. This refers not primarily to the notion that educational institutions become service providers, but rather that they should become protagonists in the processes of civic society.

Environmentally specific daily practices have to be made visible in order to establish a new learning culture, as they tend to be marginalized in the theories of lifelong self-directed learning. Life-world specific evaluation criteria that relate to life in certain social contexts and the environmental context in general are important. Alexandra Withnall (2006: 30) pinpoints the fact that there is a new perspective on learning of older individuals, in the sense of “how people make sense of their own attitudes to learning and how they have acquired beliefs and values about what education and learning mean in the context of their own lives”.

A new learning culture cannot only be determined by principles of private informal learning. We ought to be skeptical toward the anti-institutional direction in the debate revolving around lifelong learning. In its professional orientation, educational gerontology/geragogy will have to develop in the direction of a *transdisciplinary* and *methodologically open subject*. This applies to recognizable focal points of research and theoretical discussion, which can also be understood as thematic concentration. The aim should be an *innovative practice-oriented research* which, on the one hand, reflects critically on educational practice and, on the other hand, deals critically with the relationship between empirical research and political practice.

The future of geragogics depends essentially on the extent to which it succeeds in reacting to the growing interest of older people in education with adequate programs. To this end a further development of geragogic core competencies supported by research is needed. An essential challenge in this context is the maintenance of the distinction between adult education and gerontology. The social framework conditions are favorable, but the politico-social acceptance of geragogic action must always be sought and fought for anew. In this sense geragogics remains a risky undertaking and an exploratory movement.

Appendix: Case Study of a ‘Successful’ Initiative in Older Adults’ Learning in Austria

The ‘Monday Academy’ takes place in the spring and winter terms every year. It is supported by the Federal Ministry for Labor, Social Affairs and Consumer Protection. It is a series of lectures given on 13 evenings across the entire academic year. Since June 2003, the “Monday Academy” has been organized and developed

further by the Zentrum für Weiterbildung (Center for Continuing Education) at Graz University. It was created to offer education to older persons with an interest in tertiary education free of charge. The series of events that ensued has not only attracted older persons but now targets persons from all age groups and social strata under the motto “Education for all by making science generally understandable”.

The Monday Academy has a scientific management team in charge of contents. It is composed of five professors from various faculties. The team is appointed for a 3-year term of office and chooses a spokesperson. All members of the scientific management team are also facilitators and moderators at events. Each academic year has one underlying theme which is dealt with from the perspectives of different scientific disciplines in lectures. The speakers are volunteers who give their lectures free of charge.

The ‘eMonday’ (eMontag) concept is an extension of the Monday Academy. Since November 2004 the regular lectures of the “Monday Academy” have been broadcast live via Internet (stream or video conference) for audiences at regional institutions of the Land of Styria, in Lower Austria and Salzburg. Interested parties who live outside Graz are thus able to follow the “Monday Academy” from their area. The lectures are given in the auditorium of Graz University, filmed by three cameras and broadcast directly in the three ‘satellite locations’. After each series of lectures, the Center for Continuing Education publishes the lecture in a collection of texts, provided that the required funds have been generated. In this way, interested parties can read up on the past lectures or find inspiration for further treatment of the topic.

The aim of the Monday Academy is to make scientific information available to persons who do not have an academic background. Lectures that are generally understood and backed up by audiovisual presentations are to give attendees an idea of what scientists and scholars deal with in their disciplines. It is an intergenerational program since it not only addresses older persons but also attracts people from other age groups who attend the Monday Academy. Educationally disadvantaged strata of society are included inasmuch as scientists and scholars are directed to word their lectures in generally understandable language. The “Monday Academy” reaches a large audience, 7500 persons per year. The “Monday Academy” project is sustained by the publication of texts, online videos, radio recordings and continuous support by the Center for Continuing Education. The programme is based on strong networking. The Center for Continuing Education has linked up with towns and smaller communities, centers of education and technology, schools, companies etc.

References

- Alheit, P., & Dausien, B. (2002). Lifelong learning and ‘biographicity’. Two theoretical views on current educational changes. In A. Bron & M. Schemman (Eds.), *Social science theories in adult education research* (pp. 211–241). Münster: LIT Verlag.

- BGBl. (1998). *Bundesgesetz über die Förderung der Anliegen der älteren Generation (Bundes-Seniorengesetz)*. https://www.ris.bka.gv.at/Dokumente/BgblPdf/1998_84_1/1998_84_1.pdf. Accessed 16 Oct 2014.
- Dench, S., & Regan, J. (2000). *Learning in later life: Motivation and impact*. Research report 183. Nottingham: Department for Education and Employment.
- Eurostat. (2013). *Adult education survey 2011/2012*. Brussels: Eurostat.
- Kade, S. (1998). Institution und generation – Erfahrungslernen in der generationenfolge. In Keil & T. Brunner (Eds.), *Intergenerationelles lernen. Eine zielerspektive akademischer seniorenbildung* (pp. 33–37). Graftschafft: Vektor-Verlag.
- Kolland, F. (1984). Bildungsbenachteiligung älterer Menschen. *Berichte aus Forschung und Praxis*, 1, 1–35.
- Kolland, F. (2005). *Bildungschancen für ältere Menschen. Ansprüche an ein gelungenes Leben*. Münster/Wien: Lit.
- Kolland, F., & Ahmadi, P. (2010). *Bildung und aktives Altern. Bewegung im Ruhestand*. Bielefeld: Bertelsmann.
- Krais, B. (1996). The academic disciplines: Social field and culture of the discipline. In D. Sciulli (Ed.), *Normative social action: Crossnational and historical approaches* (pp. 93–111). Greenwich: JAI Press.
- Mozaffari-Anari, K. (2004). *Ältere menschen in der erwachsenenbildung. pro und contra einer neuen zielgruppe*. Master thesis, University of Graz/Erziehungswissenschaften.
- Republik Österreich. (2011). *Strategie zum lebensbegleitenden Lernen in Österreich (LLL 2020) Strategy Programme for Lifelong Learning 2020*. Wien: AV + Astoria UZ24.
- Rowe, J., & Kahn, R. L. (1997). Successful ageing. *The Gerontologist*, 37(4), 433–440.
- Schröder, H., & Gilberg, R. (2005). *Weiterbildung Älterer im demographischen Wandel*. Bielefeld: Bertelsmann.
- Sommer, C., Künemund, H., & Kohli, M. (2004). *Zwischen selbstorganisation und seniorenakademie. Die vielfalt der altersbildung in Deutschland. Beiträge zur alterns- und lebenslaufforschung, Bd. 4*. Berlin: Weißensee.
- Withnall, A. (2006). Exploring influences on later life learning. *International Journal of Lifelong Education*, 25(1), 29–49.

Chapter 5

Botswana

Rebecca Lekoko

While the notion of older adults' learning/education has come a long way, the concept still requires rigorous research for informed pedagogical practices in some contexts, as is the case with issues of later-life learning in Botswana. Nothing is in place to inform discussion on this topic of older adult learning. The area is neither defined nor discussed in any regulatory documents, be it for formal, non-formal or informal learning systems. It can, therefore, be argued that this negligence constitutes a fertile ground for unstable and sporadic practices. This chapter is necessary and timely as a pre-condition for fruitful discussions and informed actions, especially at a time when the country is nearing the end of its journey to become an 'educated and informed nation' by the year 2016 (Republic of Botswana Presidential Task Force 1997 – Vision 2016).

At a glance, Vision 2016 could have been used for initiating discussion on older adults learning. It lays out a coherent system for Botswana to reach its dream of an educated and informed nation by 2016. Living this dream means active involvement of everyone through a process that rejects discrimination of any kind, whether based on gender, age, religion, colour, ethnic origin, geographical location, language or political opinions. A fundamental principle for action is “*seabe sa Motswana mongwe le mongwe*” (the role and active participation of every Motswana) (Republic of Botswana Presidential Task Force 1997). Learning is considered a key enabling factor for active participation. Individually and collectively, every Motswana should learn community and national building skills to contribute to the Vision. Older adults too should be afforded “the right” opportunities to learn. However, nothing concrete has been done to use this policy document to support older adults' learning. This chapter, therefore, attempts to introduce a model of learning for older adults in Botswana.

R. Lekoko (✉)

Department of Adult Education, University of Botswana, Gaborone, Botswana
e-mail: lekoko@mopipi.ub.bw

In introducing older adult learning, a good start is to learn from debates around the definition of older adults. Accordingly, this chapter is organized around three main sections. The first section explores the concept of older adults in Botswana with lessons from local researchers such as Ama and Ngome (2012), Lucas (2009) and Mpuang (2000) together with relevant international literature (e.g.; Morstain and Smart 1974; Gray and Kadabaki 2005; Findsen and Formosa 2011). In the section that follows, a model for learning emerges detailing the guiding principles, and avenues for learning. Finally, some reflections and recommendations are presented reflecting what needs to be done to assist older adults to enjoy their rights to learning.

5.1 Defining Older Adults in Botswana

As more and more countries identify strongly with the tradition of older adults learning, debates intensify about who these people are. The critical question to start with then is ‘Who are these older adults in the region and in Botswana?’

In southern Africa, some countries refer to people of ages of 60 and above as older adults (Lucas 2009). Others start at 65 years. In South Africa, for example, the age of 65 is for men and 60 for women (Kalula and Oliver 2004 cited in Lucas 2009). This trend of using a particular chronological or calendar age as a yardstick to determine who are older adults is globally followed and considered problematic (Findsen and Formosa 2011). These authors cite a case of “60 as in United Nations or 65 in Eurostat” (p. 10). Moreover, the onset age for older adulthood is inextricably aligned with major national policies and other regulatory documents such as the Old Age Pension Schemes (Findsen and Formosa 2011). It is thus reasonable to expect Botswana to follow this global trend.

In the case of Botswana, the age of 65 is clearly demarcated in well-publicized government led research studies and major policy documents. First and foremost, the Republic of Botswana, Central Statistics Office, Population Census Study (2009) bears evidence to the claim that 65 years is an on-set age in Botswana as Table 5.1 indicates.

Breaking up the population into different ages is useful as we focus on who are older adults. Table 5.1 indicates that the majority of adults fall under the

Table 5.1 Population by background characteristics – population study of 2006

Population	Males	Females	Ages
1,773,240	851,655	921,585	0–4=12.0 %
			5–14=23.4 %
			15–64=58.2 %
			65 +=5.0 %

Source: Republic of Botswana, Central Statistics Office (2009)

category of 15–64 years. These are considered active and of a working-age population. On the other hand, there are those classified 65 and over, described as non-working (formal employment) or retired. This group made up only 5 % of the population in 2006.

Furthermore, different policies in Botswana cater for the older population – for example, the Old Age Pension/Retirement Age and Revised National Policy on Destitute Persons suggest this age of 65. The Old Age Pension Scheme clearly stipulates that the entry age for receiving a benefit is 65 (Republic of Botswana, Department of Social Services 2002). The Revised National Policy on Destitute Persons also implies this age as a criterion for destitution. It defines one category of its beneficiaries as ‘any individual in the old age who is incapable of engaging in a sustainable economic activity and has unreliable and limited sources of income’. A study by Ama and Ngome (2012) places older adults of ages 65+ as mostly vulnerable to this condition, thus making it possible to conclude that the Revised National Policy on Destitute Persons too is in agreement that older adults are people age 65 and above. Further review indicates that although the New Public Service Act of 2008, which commenced in 2010, defines the retirement age as 60 years for most civil servants, it allows serving teachers to opt to retire at 65 years (Republic of Botswana, Directorate of Public Service Management 2010).

At this point, we are convinced that older adults in Botswana are people aged 65 and over. On the other hand, we are aware of the limitations of a definition using chronological ages. Finsen and Formosa (2011), for example, cite Victor (2005) as advising that “using biological markers or some notion of functional age to define later life and older adults is severely limiting for both conceptual and technical reasons” (p. 10). Gray and Kadabaki (2005) too, although writing from a health perspective model, suggest that whenever we think of developing curriculum for older adults, we should not consider chronological age alone but also other “unique attributes, talent, abilities, capacities, hopes, visions and knowledge” (p. 59). In this manner, strategies for learning should consider both the advantages and shortcomings unique to older adults so as to implement learning experiences that address their real life situations.

A categorised view of older adults represented in Fig. 5.1 reflects efforts to add more attributes in defining Botswana older adults.

This categorized description of older adults adds more to our understanding of the heterogeneity of this group. Those who have never worked are said to have low levels of literacy or no formal education (Ngome 1994, cited in Lucas 2009). The majority struggle to sustain themselves. On the other hand, the 2006 Population Study indicated that the retired include more people with a secondary or high school education (12 years of basic education) at 41.7 %, followed by those with primary education (the first 7 years of elementary schooling) at 33.9 %. These characteristics will act as guidelines in deciding on learning principles for these older adults.

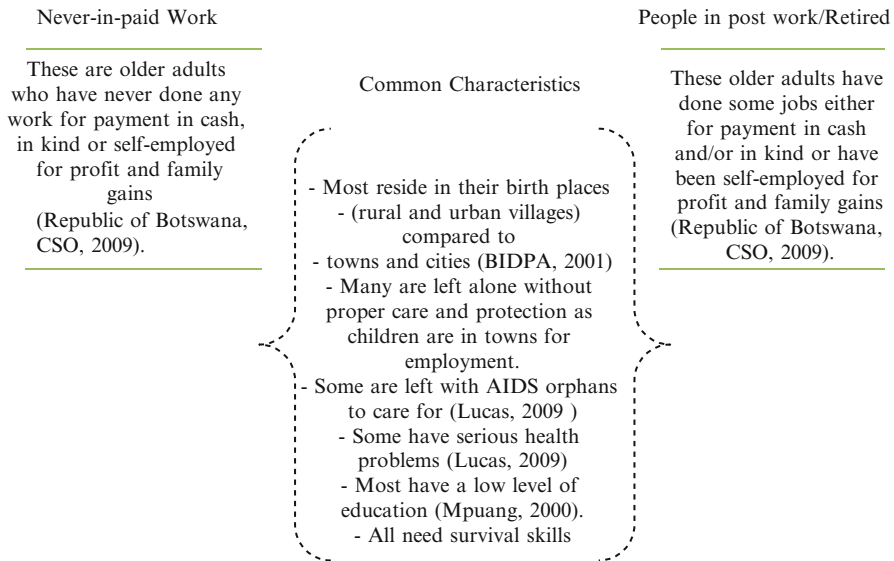


Fig. 5.1 Categories of older adults in Botswana

5.2 Learning for Older Adults in Botswana: Theoretical Perspectives

This section starts to articulate models for older adult learning in Botswana. Models can be understood here as frameworks that guide decisions on the ‘what’ (content), ‘how’, ‘why’ (purposes), ‘when’ and ‘where’ issues of older adults learning. These frameworks are presented with respect to (i) philosophies of older adult learning (ii) principles relevant to older adults’ learning; (iii) learning spaces for older adults and (iv) curricula suitable for older adults in the context of Botswana.

It appears, from the background given, that intentional effort to cater for older adults in Botswana should move away from formal education to indigenous/traditional learning systems. Formal education is defined by Thaman (2000, p. 52) as “organized, institutionalized learning such as in schools and colleges”. These systems are known for their standardized practices. Tett (2006) cites a few of these: standardized entry requirements and procedures; pre-determined outcomes and pre-specified uniform learning standards. These are not usually suitable for use by older adults; indigenous epistemologies and pedagogies usually are deemed to be more appropriate.

Indigenous epistemologies are described by Thaman (2000) as a form of non-institutionalized learning. McGregor (2006) defines them as traditional ecologi-

cal knowledge while Avoseh (2001) refers to them as lifelong processes that remain culturally accepted ways of learning. Flavier et al. (1995) see them as knowledge that is unique to a given culture or society. As with the instance of the Aboriginal, for these indigenous epistemologies “to have any real meaning, people must live them, if not, learning is not taking place” (McGregor 2006). I argue that the following principles will mostly apply for effective learning to take place.

(i) Each one, teach one.

‘Each one, teach one’ is an adult teaching philosophy espoused by Laubach in his religious literacy work way back in the 1930s (Magil and McGreal 1988). It has been borrowed for use in this chapter because of its precise way of explaining learning that occurs in ways that cannot be delineated as passive. The philosophy richly promotes learning through active engagement of everyone present. Typically, the African communal view of learning is such that it is “the duty of everyone to ‘teach’ at some point and to ‘learn’ at other times” (Avoseh 2001, p. 485) making each individual an active participant in learning for a living. Reasonably then, older adults have much to offer in terms of teaching as much as they expect to learn from others. It is a principle of “live and let others live”, so says Avoseh. This principle is aptly summarized in Botswana through the Setswana concept of *Botho* (respect for each other) (Republic of Botswana, Presidential Task Force 1997). Applied to learning, *Botho* suggests learning contexts that respect people’s experiences and ways of learning. Thus, ‘Each one, teach one’ is a concrete foundation on which to craft a framework for older adults learning in Botswana.

(ii) Learning as part of a life course

Learning “cannot be separated from the rest of life’s activities” (Avoseh 2001, p. 482). Avoseh is clear that the “beliefs, ceremonies, rituals and festivals form the foundation for learning throughout life of every member of the community” (ibid). Similar to Aboriginal epistemology, indigenous learning takes place in rather ordinary ways – for example, at occasions which bring people together (feast, dance, celebrating or in grief), as McGregor (2006) has observed. Learning through every life activity is a rationale that puts older adults’ life experiences and responsibilities at the core of their learning. This philosophy has been succinctly summarized by Nyerere (1973) who submits that “to live is to learn; and to learn is to try to live better” (p. 141).

The principles explored above present a learning perspective which treats older adults as active agents of their learning. The very status of being old affords them respect. In the context of Botswana old age is associated with wisdom, ingenuity and activeness in traditional ways of life such as communalism, group solidarity, oral traditions, weaving, pottery, fishing, mining, forestry and agriculture, just to mention a few. Older adults are, therefore, capable of self-organizing through informal/relaxed learning structures; some of these contexts are presented in the following discussion.

5.3 Where Can Older Adults Go to Learn?

Self-organizing for informal/relaxed learning is possible in Botswana through a number of structures and processes defined as learning spaces in this chapter. The term *learning spaces*, according to MacPhee (2013), refers to locations, physical or virtual, where learning happens. Table 5.2 presents some of these learning spaces.

Most of these learning spaces have been chosen because of their availability in every community as well as free accessibility. Efforts can be made to organize them for specific learning purposes.

Table 5.2 Learning spaces for older adults in Botswana

Space	Description
Libraries	The library system in Botswana comprises of community, branch, and village reading rooms
	A community library is a medium-size locality, established since 2007 under the initiative of the Robert and Sarah Rothschild Foundation in collaboration with local leadership and community members (Lekoko et al. 2011). Because of their internet connectivity, they attract many people and are accessible free of charge
	A branch library is a public library found in major population centres of the country like towns and rural district headquarters. Its use is not different from that of a community library
	A village reading room is community-owned and built initially through funding from the Ministry of Local Government's drought relief programme. It offers newspapers and book-borrowing services through the Botswana National Library Services. These facilities are still not as developed as the other two forms (Lekoko et al. 2011)
	These places can be reformed to provide learning materials and opportunities for older adults. They are being modernized to include up to date materials and state of the art computers and communication equipment (Republic of Botswana, Presidential Task Force 1997)
<i>Dikitsong centres</i>	The Botswana Technology Centre (BOTEC) pioneered the Kitsong Centres (Knowledge Centres). The Centres provide a computer communication system to enable public access to integrated e-mail and online information, especially for rural people. The <i>Dikitsong</i> centres have been adopted by the government and rolled out countrywide through the Botswana Post (http://www.botec.bw/index.htm)
<i>Kgotla</i>	A <i>Kgotla</i> is a village meeting place. It serves a number of purposes – for example, as a customary court – to disseminate information to the public and as a place for celebrating events like Independence Day. It is a relaxed cultural way of learning guided by the village elders known as chiefs. The <i>Kgotla</i> embodies the principles of open and free discussion that can drive effective learning of older adults (http://en.wikipedia.org/wiki/Kgotla)
Community halls/centres	Community centres are spread across the country for use by the public. Some are under-utilized while others have been turned into 'learning centres' to provide learning opportunities for community members. Understood in the context of older adults learning, these centres are readily available learning spaces because they are free to be used by the community

(continued)

Table 5.2 (continued)

Space	Description
Social networks	Social networks such as <i>Metshelo</i> (rotating credits) are borne out of the need to satisfy a particular life challenge be it lack of money, food, equipment/ materials or utensils. These are all about people organizing themselves to do what each individual cannot afford alone. <i>Metshelo</i> come in different forms and for older people's extending and using these for learning purposes
Family institutions	Older adults have a strong sense of attachment to their families and they will be willing to invest their time in learning with family members. These institutions are natural platforms for families to engage in collective learning activities. The family structure can provide a safe and open learning avenue for older adults
<i>Pitso</i> systems	<i>Pitso</i> in the traditional Setswana means "a community gathering" usually at the <i>Kgotla</i> . Over the past few years, a pattern has emerged particularly by the government ministries/departments to use the concept <i>Pitso</i> as an organizing principle. There are Education <i>Pitso</i> , Agriculture <i>Pitso</i> , etc. Gatherings organized around this theme are meant to give participants freedom of speech and fair involvement in discussion by all. These types of platforms can be organized and directed to address specific aspects of older adults' learning
Circle of friends	Circles of friends are apt platforms for sharing experiences and learning together. In organized birthdays, for example, people with expertise in a number of areas like counselling, beautification, financing are invited to give short speeches. These relaxed environments may be suitable learning platforms for older adults who usually stay isolated in their respective homes and need friends to talk with
Public TV shows	Television shows such as <i>Molemo-wa-Kgang</i> and <i>Matlho-a-Phage</i> that explore current issues in the lives of Botswana (e.g. politics, social issues, culture, religion) can be useful learning avenues for older adults. They are free to the public and thus can be organized for the sake of sharing with older adults

5.4 Curriculum Assumptions of Older Adults in Botswana

This section discusses sets of learning objectives and/or content considered relevant for older adults in Botswana. Not all can be discussed within this limited space; below are just some examples.

- (i) **The need for community living skills.** It has been argued in this chapter that older adults in Botswana are those 65 years old and above. This age coincides by and large with retirement for those who had been working and their going back to their traditional villages to join their age mates who never engaged in paid (monetary) work. Learning for this group becomes an adaptation strategy. Community living skills like collaboration, networking, cooperation and being part of others are necessary to smooth this adjustment. They may, for example, desire to make new friendships and relate well with others ('a person is a person through other people') (Mbiti 1988). Thus, as Morstain and Smart (1974) state with respect to adult motivation, maintaining social relationships is one of the greatest reasons for learning at this stage of life.

Retired workers who have spent many years away from their homes in their respective places of work may face challenges of adapting to fresh lifestyles in their original place of birth. Some have retirement packages and are at a loss with how to spend and sustain the meagre packages for the rest of their lives. Those who have assumed new roles such as caring for their sick adult children and orphaned grandchildren, especially as a result of deaths caused by the HIV/AIDS, also need some skills to cope (Lucas 2009). This idea is very much like Morstain and Smart's (1974) learning motivation of social welfare defined as learning driven by a desire to contribute and to serve the community.

(ii) **Adaptation to current and global changes.** The contemporary world offers many possibilities for learning through new technologies. In some local libraries (e.g. community libraries), there are computers which older adults can use for learning purposes. Many of these older adults also use cell-phones, radios and TVs. These technological gadgets offer great opportunities for learning. Learning strategies for older adults in Botswana would be lacking without factoring in communication technologies. Here these technologies are explained as the electronic means of capturing, processing, storing and communicating information (Heeks 1999 cited in Lekoko and Morolong 2007). Adeya (2002) defines them as communication devices or applications encompassing electronic networks and other services for information accumulation and flow in the public and private spheres. ICT, inclusive of global perspectives, often gives learning its form, meaning and utility (Avoseh 2001) and, as such, successful learning for older adults should include technologies compatible with their life needs and situations.

Botswana has a potential to implement ICT-supported education for all its older citizens because of its current status of the use of technology. Rezaian's (2002) study ranked Botswana third (1st South Africa and 2nd Mauritius) among 21 sub-Saharan countries in terms of network readiness and growth competitiveness indices. Furthermore, Kabonoki's study (2007) revealed considerable use of technological devices in Botswana. He reported that 86.9 % of people as using mobile phones, 62.2 % for DVDs and 3.73 % having access to the internet. Internet use is now widespread especially with the installation of computers in all public libraries – branch, community and village reading rooms. Vision 2016 has actually set the stage for high connectivity by stipulating that 'Botswana must improve the access of its people to information and new technologies that are sweeping the world' (Republic of Botswana, Presidential Task Force 1997). Thus, older adults live in an era in which technology is used for learning. They must take advantage of this too.

5.5 Reflections and Recommendations

Possibilities for implementing informal learning modalities for older adults can be materialized when certain considerations, transformations and structures are borne in mind. Some are discussed below.

- (i) Whether by choice, coincidence or coercion, many older adults in Botswana stay in urban and rural villages, not towns or cities. They are part of traditional lifestyles and local means of learning. When learning modalities for them are considered, such ideas should consider these contexts in which they learn and how they may apply what they have learned.
- (ii) Reforming some structures (see Table 5.2) into learning spaces would cost less than opting for formal structures which at present are not accessible nor accommodative of those that policies define as beneficiaries. Moreover, using informal/non-formal learning spaces is wise, given that these are readily available as part of a community's way of learning.
- (iii) By comparison with other groups in Botswana, older adults have never been accounted for in education and learning policies, making it possible to leave them out as we journey to an educated and informed nation by 2016. Without policies specifically tailored to support older adult learning, the future of this area remains dark.
- (iv) While outside assistance should be expected, strategies for older adult learning should guard against the introduction of powerful hierarchies by those with resources and other support systems. Practices in Botswana of empowerment strategies such as the *Nyeletso Lehuma* (poverty elimination) indicate that some interventions from either the government or from international support organizations entail elite intrusion and power structures that are not compatible with traditional lifestyles and ways of learning. Care should be taken to ensure that participation of the target group is not compromised.
- (v) Over recent years, the international communities elsewhere have invested substantially into older adults' learning. The emergence of Third Age Universities is such an example. Botswana can gain appropriate guidance of knowing what to do with its older adults. Benchmarking against comparative international institutions has been used in this country and it is time Botswana does the same with learning of its older adults; cautiously, without the country losing its distinctiveness.

Finally, it is noteworthy that this chapter is basically introductory and invitational. It provides a general overview of the concept of older adults' learning together with learning modalities, spaces and curricula, intending that these can generate more discussion around this area of later life learning. It is hoped that adult educators, social workers and others who may develop interest in this area will use this chapter to drive discussion further as they decide what is relevant to their situations.

The greatest wish is that there should be no confusion concerning who should be responsible for older adult learning. The Government of Botswana is the major policy-maker and provider of education in its different formal and non-formal forms; thus, the onus of instigating a policy for older adults' learning/education should rightly lie within the government's purview. Since the United Nations has endorsed the notion that older people's rights are human rights too, it is hoped that Botswana will be more encouraged to address the rights of its older adults to learning.

References

- Adeya, N. (2002). *Information and communication technologies in development*. A paper presented at a conference on Global Equality: Rethinking ICTs in Africa, Asia and Latin America.
- Ama, N. J., & Ngome, E. (2012). Healthcare providers' perceptions of the sexual and reproductive health needs (including family planning) of elderly women from selected sites in Botswana. *World Journal of AIDS*, 2(3), 143–158.
- Avoseh, B. M. (2001). Learning to be active citizens: Lessons of traditional Africa for lifelong learning. *International Journal of Lifelong Learning*, 20(6), 479–486.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Taipei: Sense Publishers.
- Flavier, J. M., et al. (1995). The regional program for the promotion of indigenous knowledge in Asia. In D. M. Warren, L. J. Slikkerveer, & D. Brokensha (Eds.), *The cultural dimension of development: Indigenous knowledge systems* (pp. 479–487). London: Intermediate Technology Publications.
- Gray, J., & Kadabaki, K. (2005). A strength perspective for assessing older adults: Curriculum enrichment is a human behaviour course. *The Journal of Baccalaureate Social Work, Special Issue on Gerontology*, 55–67.
- Kabonoki, S. K. (2007). Familiarity with technology and readiness to use it in learning: *Lonaka Bulletin of the Centre for Academic Development*. University of Botswana, 29–41.
- Lekoko, R. N., & Morolong, B. L. (2007). Poverty reduction through community-based ICTs. Examples from Botswana and other African countries. In M. Gasco-Hernandez, F. Equiza-Lopez, & M. Acevedo-Ruiz (Eds.), *Information communication technologies and human development; Opportunities and challenges* (pp. 116–137). Hershey: IDEA Group Pub.
- Lekoko, R., Moesi, K., Okori, C., & Mukasa, J. (2011). *First annual impact assessment study: Sesigo project*. A research study for ACHAP by Pierian Springs Communications. <http://www.sesigo.org/bw/assets/files/Sesigo%20First%20Report.pdf>. Accessed 21 Oct 2013.
- Lucas, P. M. (2009). *Old age pension as a social security initiatives: The case of Botswana*. Unpublished dissertation, University of Botswana.
- MacPhee, L. (2013). *Learning spaces*. <http://www.nau.edu/rmzz/learnng-spaces>. Accessed 4 Nov 2013.
- Magil, F., & McGreal, I. (1988). *Frank Laubach's letters by a modern mystic: From Christian spirituality*. <http://www.dwillard.org/articles/artview.asp?artID=43>. Accessed 7 Jan 2014.
- Mbiti, J. S. (1988). *African religions and philosophy*. London: Heinemann.
- McGregor, D. (2006). *Traditional ecological knowledge. Idea: The art and science review* (Vol. 3(1)). <http://www.silvafor.org/assets/silva/PDF/DebMcGregor.pdf>. Accessed 18 Dec 2013.
- Morstain, B. R., & Smart, J. C. (1974). Reasons for participation in adult education course: A multivariate analysis of group differences. *Adult Education*, 24(2), 83–98.
- Mpuang, K. A. (2000). *A study of the experiences of caregivers of the elders in Gaborone*. Unpublished dissertation, Ohio University.

- Nyerere, J. (1973). *Freedom and development – Uhuru Na Maendeleo: A selection from writings and speeches of 1968-73*. Oxford: Oxford University Press.
- Republic of Botswana, Central Statistics Office (CSO). (2009). *Botswana demographic survey, 2006*. Gaborone: Government Printer.
- Republic of Botswana, Department of Social Services, Ministry of Local Government. (2002). *Revised national policy on destitute persons*. Gaborone: Government Printers.
- Republic of Botswana, Directorate of Public Service Management. (2010). Public Service Act 2008. *Government Gazette*, 2008-07-15, XLVI, 133–162.
- Republic of Botswana, Presidential Task Group. (1997). *Long term vision for Botswana; towards prosperity for all*. Gaborone: Government Printers.
- Rezaian, B. (2002). Integrating ICTs in Africa development: Challenges and opportunities in Sub-Saharan Africa. In M. Gasco-Hernandez, F. Equiza-Lopez, & M. Acevedo-Ruiz (Eds.), *Information communication technologies and human development: Opportunities and challenges* (pp. 23–56). Hershey: IDEA Group Publishers.
- Tett, L. (2006). *Community education, lifelong learning and social inclusion*. Edinburgh: Dunedin Academic Press.
- Thaman, K. H. (2000). Interfacing global and indigenous: Knowledge for improved learning. In *Interfacing global and indigenous knowledge*. <http://www2.unescobkk.org/elib/publications/aceidconf6/themetwo.pdf>. Accessed 21 Dec 2013.
- Victor, R. R. (2005). *The social context of ageing*. London: Routledge.

Chapter 6

Brazil

Meire Cachioni, Mônica de Ávila Todaro, Tiago Nascimento Ordonez,
and Thaís Bento Lima da Silva

6.1 Introduction

Education is a continuous process experienced by human beings throughout their whole life. This process takes place not only during the years spent at school, the main institution responsible for education, and through which society transmits, maintains and improves its values, but also through contact with other social institutions and educational agencies. As a human being grows older, the array of biological, psychological, social and cultural influences continuously broadens and increases the possibility of self-education. Neither a child, nor an adult, even the less educated or less intellectually sophisticated, is a blank page. Throughout life, no one is only taught or is the single aim of the guided educational action provided by others.

To remember these principles is to reaffirm the faith in the possibility of progress in individuals of all ages, in social groups and in our society through education. To associate them with initiatives that educate mature adults and older people is to remember that the human potential for development and for influencing others does not end during old age. However, even though they are fine and promising, it hasn't been long since our society has awakened to the necessity to, in fact, apply such principles. Older people had first to trouble not only themselves, as it has always

M. Cachioni (✉) • M. de Ávila Todaro
Graduate Program in Gerontology, University of São Paulo, São Paulo, Brazil
e-mail: meirec@usp.br; avila-todaro@uol.com.br

T.N. Ordonez
Brazilian Association of Gerontology, São Paulo, Brazil
e-mail: tiagordonez@gmail.com

T.B. Lima da Silva
Faculty of Medicine, University of São Paulo, São Paulo, Brazil
e-mail: gerontologathais@gmail.com

happened in old age, but also their families, their workplace, the economy and the retirement systems of their countries. When they gained more visibility, due to population ageing, and because of the rise of longevity, many societies started to take practical actions to guarantee what became to be recognized as a right of this age group and as a social necessity. It was exactly in this context that the first initiatives appeared to offer education to the older age group in Brazilian society (Cachioni 2003). This group comprises more than 21 million people who are 60 years old or older, that is, around 11 % of the population.

Various private and governmental initiatives in the field of educational gerontology offer educational alternatives to older people, with the objective of promoting wider social insertion and stimulating the acquisition of more knowledge, under the perspective of permanent education. The amplitude of the definition of ‘permanent education’ highlights the wide range of basic categories of learning activities, namely formal, non-formal and informal learning, beyond mere schooling. This chapter addresses the context of education for older people in Brazil, its course, development, current possibilities and future prospects.

6.2 Public Policies and the Education to the Older Population

Education is considered a fundamental right, and as such, is included in some public policies intended to the older population. However, there isn’t yet a law exclusively aimed at the education of older people in Brazil. The Brazilian educational legislation includes basic education (elementary school, middle school and high school) and higher education.

The ‘older people’ group is included in specific regulations of the modality of Youth and Adults Education (EJA). On the National Curricular Guidelines for Youth and Adults Education (Report CEB 11/2000), the ‘older people’ group is mentioned, but as part of this modality. Despite the inclusion of older people in the EJA, we understand that the definition of an older person as an adult does not consider his educational needs. On regulations directed at older people, it can be noted that education is relevant. On the National Policy for Older People (Law # 8842/94), clause three proposes the improvement in studying conditions so as to facilitate their learning, creating programmes tailored to this age group, in addition to educating the population to better understand the process of ageing. The Senior Citizen Statute (Law # 10741/03) mentions the subject on Chapter 5, articles 20–25:

Art. 20. The senior citizen has the right to education, culture, sports, leisure activities, products and services that respect their specific age condition.

Art. 21. The Public Authority will provide senior citizens with access to education, tailoring content, methodologies and teaching materials of educational programmes to their benefit.

§ 1^o *The specific courses for senior citizens will include content in the areas of communication, information technology and other technological advances for their integration to modern life.*

§ 2^o *Senior citizens will participate in celebrations of civic and cultural nature, so as to share knowledge and experience with other generations, thus preserving cultural memory and identity.*

Art. 22. Subjects related to the process of ageing, and to respect for and valorization of older people will be included in the basic teaching content of the various levels of formal education, with the objective of eliminating prejudice and raising awareness on the subject.

Art. 23. The inclusion of senior citizens in cultural and leisure activities will be offered through discounts of at least 50 % (fifty percent) on tickets to artistic, cultural, sports and leisure events, as well as preferential access to the respective locations.

Art. 24. Mass media will secure space or special hours of operation targeted at senior citizens with informative, educational, artistic and cultural purposes, and also targeted at the general public on issues about the process of ageing.

Art. 25. The Public Authority will support the creation of an Open University of the Third Age and will encourage the publication of books and periodicals whose content and editorial standards are adapted to older people, in that they facilitate reading, considering their usually reduced visual capacity.

The Law of Guidelines and Bases for National Education (Law 9394/96) does not make a reference to the education of senior citizens nor does it suggest the incorporation of the subject of ageing in our national curriculum. The National Curriculum Standards (PCN) does not include the subject of ageing in the presentation of transversal subjects either, even considering that ageing should be discussed from this perspective and that these standards were organized after the Senior Citizen National Policy was passed, which listed a series of guidelines on the subject of education. There is only one indication with regards to the process of ageing and to old age on the PCN Natural Sciences curriculum of Elementary School when it comes to human development. Until the present day, the National Counsel of Education (CNE), a collegiate body that is part of the Ministry of Education (MEC), and that was created with the objective of collaborating in the development of the National Policy for Education and performing legislative, deliberative and advisory assignments to the Minister of Education, did not issue any opinion or decision specifically on the matter of the education of senior citizens.

6.3 History of Senior Citizen Education

Ongoing education in the context of ageing in Brazil is currently found within the areas of formal, non-formal and informal education. Formal education receives senior citizens in schooling locations that certify enrolled individuals. It is the case,

for example, of the Integrated Centers of Youth and Adults (CIEJAs), created to teach how to read and write and to promote the advancement of schooling (Brazil has a high number of people that are illiterate or/and with a low level of schooling). Other institutions, such as Open Universities of the Third Age (UATIs), Community Centers and other Community facilities, for example, offer non-formal educational programmes that do not follow a sequential and hierarchical system of progression and have varied duration and subjects (courses in knowledge update, foreign languages, courses related to artistic or physical manifestations, digital inclusion, etc.). The informal education takes place through information received, for example, from new technologies, like the internet. Television, magazines and books also educate informally. They are called 'symbolic means'. In addition, the family, as an institution that shapes behaviours, also educates through direct experience.

By the end of the 1940s, the first public national policies of education for adults were implemented. They disseminated literacy campaigns throughout Brazil. In the beginning of the 1960s, educational and popular cultural movements linked to social organizations, the Catholic Church and government agencies, developed experiments to teach adults how to read and write. One of their goals was to raise awareness of the participants with regards to their rights and to improve their critical analyses of their reality, so they could learn how to intervene to change unfair social structures. In the 1970s, the Brazilian Literacy Movement (MOBRAL), led by the military regime to its legitimisation, followed a totally different guideline (Di Pierro 2005). In 1986, when MOBRAL was phased out, its successor, the Educar Foundation, opted to abandon the direct execution of educational services, becoming instead a development and technical support institution through partnerships with state and city teaching agencies, companies and community entities. Many Brazilian cities partnered with Educar and were surprised with the extinction of the agency in 1990 (Di Pierro 2005).

The Brazilian Constitution of 1988 recognized the right of all citizens to education by declaring elementary school mandatory and free, regardless of age. However, in the 1990s, the Law of Guidelines and Basis for National Education 9.394/96, the Maintenance and Development Fund for Elementary School and Valorization of Teaching (FUNDEF), and the remodelling of Professional Education, through the Decree 2.208/97, redefined the course of educational policies, and this meant an expressive step backward. The secondary role played by the Youth and Adults Education (EJA) was then highlighted in the set of educational policies (Rummert and Ventura 2007).

Starting in the beginning of the 1990s, the educational propositions for young individuals and adults returned with renewed scope and content, present in discussions conducted by different segments and sectors of society. The challenge for education of older individuals started to be the establishment of creative policies and methodology, with the universalization of quality elementary school. Internationally, there was an increasing recognition of the importance of adult education for strengthening civic consciousness and cultural education of the population, thanks to the conferences organized by the United Nations Education, Scientific and Cultural Organization (UNESCO), responsible for the improvement of education in developing countries.

It was in this context that, in 2002, the City Secretary of Education of São Paulo created the Integrated Center of Youth and Adults Education (CIEJA). This formal educational proposal was conceived as an alternative for inclusion of young individuals over 14 years old and adults with low schooling and poor professional qualification in the social-educational world. Currently, the CIEJAs have a representative population of older students enrolled in elementary school. The enrolment or return enrolment of older people to school points to the need of this age group to have access to new work-related occupations or to improve their knowledge of current work-related activities. It also shows that the search for knowledge and the acquisition of new values do not end in youth.

The education of young and adult individuals becomes, therefore, of utmost importance when analyzing the ageing population in Brazil, due to the high number of people with low schooling among older individuals. However, the concept of youth and adult education is very broad regarding age groups, putting individuals that are over 14 years old, middle-aged people and older people to share the same school space. It is necessary, therefore, to define extensive and articulated public policies to legitimate the commitment of the government towards the education of youth and adults, to enable this modality to become relevant in a country like Brazil, with its economic and social inequality, struggling with the changes in its population pyramid and the challenge of population ageing. There is also a need for collecting data and examining indicators to assess how individuals with different profiles interact in a school environment; how they relate with each other and how these social exchanges contribute to the development of civic consciousness, of intergenerational relationships and of student quality of life.

In the 1970s, the first educational programme exclusively directed to older people was created. The Social Service of Commerce (SESC) led this project, which later on, with the internationalization of gerontology, found favourable conditions in the Brazilian Universities. During that time, we imported and incorporated the expression 'third age', predominantly present in the denomination of groups, centres and national programmes for older people. Influenced by French programmes, SESC (Social Service of the Commerce) created the Open Schools for the Third Age with the objective of offering senior citizens information about biopsychosocial aspects of ageing; programmes to help prepare for retirement and culture updates. In addition to these informative courses, the schools offered physical activities like gym, yoga, swimming, craftwork and artistic activities, such as choir and fine arts. They also developed excursions and get-together parties. The orientation toward leisure prevails in the institution to this day, and has been followed by many community centres, elder associations and other institutions that were created outside of the universities and were inspired by the experience and ideology of SESC (Cachioni 2003).

Other programmes, similar to the ones at SESC, were created, including some governmental initiatives, but most of them did not have continuity. For example, Prata (cited in Debert 1997) mentions a programme called the Brazilian Legion of Assistance (LBA), terminated in 1995. This institution catered to a low-income older population, and developed activities such as manual arts, day-trips,

excursions, balls and gymnastics. In 1988, LBA had 31 units in São Paulo, and had 7055 attending older adults involved. According to Prata in his study about the programmes aimed at older people in the state of São Paulo, the programmes can be divided into three groups: traditional programmes, like retirement homes; transition programmes, including SESC and LBA programmes, which the author classifies as welfare, because “they do not offer the elderly the necessary tools to regain their desired autonomy”; innovative programmes that include services rendered by university hospitals, programmes that help prepare for retirement and universities for senior citizens. The latter have multidisciplinary teams engaged in preparing “senior citizens to go through the process of redirecting their lives, starting with their awareness of the losses and gains involved in entering this phase of their lives and during retirement” (Debert 1997: 97).

With emphasis on conducting research studies, sharing gerontological knowledge and training human resources, the Federal University of Santa Catarina created, in 1982, the Study Center for the Third Age (NETI). NETI is considered the first Brazilian programme with characteristics of a University of the Third Age (UATI). However, it was only in 1990 that the Pontifical Catholic University of Campinas, in the state of São Paulo, started a programme that replicated the French Model of Toulouse, France. The objectives of the first universities for the third age, similar to the ones in Toulouse, were to provide the older students with a culturally motivating learning environment, with discussions among peers, civic consciousness, an occupation for their free time and the development of social networks. They put special emphasis on the rethinking of stereotypes and prejudices related to ageing. Surprisingly, the profile of Brazilian students was not one of loneliness, inactivity and precarious life conditions; in fact, they were active, healthy and socially engaged.

Currently in Brazil, there are more than 200 programmes of that type present in institutions of higher learning. Most of them are characterized by projects of university extension as if they were a modality of ongoing education in a non-formal format, since their main objective is not to offer a certificate or to professionalize the older students, but to open the world of knowledge and the possibility of learning throughout one’s whole life. The academic, multidisciplinary and intergenerational environment motivates the older students to exchange experiences, be more social and reclaim their civic consciousness. There is great diversity in these programmes, as each institution makes its own decisions about objectives, content, curricular structure, activities and teachers. They operate based on their own human resources, and their own ideology about ageing and about education for middle-aged and older adults. Some institutions, such as the Federal University of Santa Maria in Rio Grande do Sul and the University of São Paulo, open their regular graduation courses to older students, offering places in certain disciplines that allow them to obtain a certificate but do not count as credit in the university. This modality enables closer contact between young and older students. Some departments require educational prerequisites, and others don’t. PUC Campinas and other institutions inspired by PUC have organized their courses as extension courses during the academic year to a population usually over 50 years old, without having educational pre-requisites.

They may be more structured or less so, and broader or less comprehensive in terms of variety of disciplines, activities and content, but usually they include psychological, sociological and medical content about ageing; cultural update in many areas of non-science subjects, science and technology; physical activities, leisure, tourism and arts. Different institutions offer distinct services, such as voluntary work, activities related to research, courses that stimulate the interaction between generations, and some have workshops related to social, literature, technical or artistic activities. Some are sequential and others offer modules. None of them certifies professionally their clients, but most of them offer diplomas and other documents attesting their participation. In institutions like the State University of Rio de Janeiro, research or study teams offer single courses or conferences or short courses for which senior citizens may apply throughout the year.

Regardless of the activities offered, the Brazilian Open Universities of the Third Age develop initiatives directly or indirectly based on the original proposal of Pierre Vellas. The programmes have been generating a true “cultural revolution” on higher learning institutions, by allowing a convergence of scientific and popular knowledge, by generating research studies and by broadening the opportunities for improvement in the quality of life of senior citizens. Ongoing education guides the teaching proposals of the Open Universities of the Third Age. Education, regarded as an ongoing process, does not separate the period of schooling, of preparation for life and the time for professional activities: a person’s whole life is an educational process. Education is no longer the mere acquisition of knowledge; instead, it is a process of development. Palma (2000) presented the problematizing participative methodology, suggested by Bordenave (1999), as a reference to the teaching practices in the programmes. According to the author, in an ongoing education teaching proposal directed to mature adults and older adults that could, however, include all age groups, the individuals involved are the investigator-educator and the student-actor, co-participants in the process of questioning and pondering about their own reality to describe it and explain it, to generate knowledge and act upon it. The reason for that is, as humans reflect about their context and respond to challenges, they get engaged, create culture, develop themselves and become individuals. Due to the heterogeneity of necessities, motivations and interests, present in senior citizen groups, deriving from the uniqueness of their history and life trajectories, investments should be done in the creation and in the improvement of a methodology for the educational work, one that values the garnered experiences and that transforms older students in agents of their own learning.

6.4 Profile and Motives for the Pursuit of Learning

Some common characteristics are present in the profile of senior citizens that pursue educational programmes in Brazil. Predominantly, the literature offers data about students enrolled in the Open Universities for the Third Age. The vast majority of women is described in studies undertaken by Cachioni (2012); Castro et al. (2007);

Irigaray and Schneider (2008); Hebestreit (2008); Pinto (2009); Alexandre et al. (2009); Sousa and Russo (2009); Kretzer et al. (2010); Sonati et al. (2010); Doimo et al. (2010); Roque et al. (2011).

The prevalence of female enrolment is a commonality in the studies of the Open Universities of the Third Age. The feminization of ageing is due to the transformation of the female role in society. This reality is influenced by life expectancy, cultural matters, reduction of birth rates and fertility, improvement in life conditions, and also a deeper concern with social and health-related issues. These combined factors corroborate the growth of the percentage of older, long-lived women, though widowed. In addition, women tend to be more sociable, and perhaps that is the reason they are more engaged in educational and social programmes (Neri 2001; Soares et al. 2010). Men, on the other hand, when they become widowers, seek new partners, and when retired, they get involved with other activities of the work place, or with political associations. The population can also be denominated as young seniors, since the average age is 60–69 years old. The need for social contact among women in this age cohort is higher, as they are in the imminence of losing their social and family roles, which could be fulfilled with the help of the Open Universities for the Third Age. The age composition observed in populations of Open Universities for the Third Age reflects not only the age composition of the general population, but also that individuals enrolled in this kind of services tend to have better conditions regarding finances, health and mobility issues than has the average Brazilian senior citizen.

Data also suggests that most students have studied for 10 years on average. It is important to highlight that the level of schooling among senior citizens at Open Universities of the Third Age is higher when compared to the average for Brazilian senior citizens. Data from the National Household Sample Survey (PNAD) collected by IBGE (Brazilian Institute of Geography and Statistics) show that the average number of schooling years is 5.7 years for individuals aged 60 or older who reside in São Paulo. The senior citizens at Open Universities for the Third Age tend to have studied longer basically for two reasons; the first is a strong demand and interest from a group that could not complete all phases of formal education, and considers the ongoing educational programmes a unique opportunity to fulfill a cherished dream of ‘studying at a university’ (Cachioni 1998). As for the second reason, individuals who throughout their lives had access to educational opportunities are better candidates to consider education as a means to face the challenges brought on by ageing. Thus, education seems to be a strong indicator of someone’s successfully dealing with old age (individuals who had educational experiences throughout their lives would have an additional advantage during their elder years).

The older adults that are engaged in Community Centers have a lower level of schooling, as noted by Castro and Borges et al. (2008), Cardoso et al. (2008) and Yassuda and Silva (2010). The described total years of schooling do not exceed 7 years in one group and 4 years in the other two groups. To identify the reasons why older adults pursue educational programmes, studies conducted by Brazilian researchers show similar results. An extensive documentary research undertaken at an Open University for the Third Age, regarding the reasons that motivated a group

of 437 older adults and older students to pursue the programme, is described in the paper of Neri (1996). Regardless of gender and age, the group gave answers that were classified in five groups:

1. Search for knowledge and cultural update: the desire to complete their cycle of formal education, fulfilling a cherished dream.
2. Self-knowledge reasons: search for opportunities of self-development, self-awareness, emotional balance and solution of personal problems.
3. Search for social interaction: intention of making friends and search for company, desire to live in a group.
4. Occupying their free time: option to compensate the loss of work and family-related roles.
5. Commitment to old age: desire to learn more to better help family members and other older adults in the pursuit of their rights.

The same survey was replicated by Cachioni (1998), Silva (1999) and Cachioni et al. (2014), in other programmes, with the same reasons mentioned by older students. The desire to learn, to be up-to-date, to take part in the world and to grow with it, to conquer one's own civic consciousness, are all reasons that motivate the mature and older adults to seek the many types of educational programmes. These programmes, among other initiatives, have become an alternative for providing some improvement in the quality of life and well-being of ageing individuals. In addition to the learning they provide, they reformulate the concept of old age, strengthening social bonds, contributing to the maintenance of functionality and autonomy, and increasing self-esteem. All these aspects are associated with the concept of successfully ageing (Cachioni and Ordonez 2011).

6.5 Brazilian Research in Educational Gerontology

Third age universities become an interesting place of research because they attract a significant number of senior citizens. This type of ongoing education, though incipient, has been the originator of studies with older students in Brazil. In 2013, a bibliographic survey was carried out through a search strategy based on the terms: 'University of the Third Age', 'University and Elderly', 'U3A' and 'UTA'. The adopted inclusion criteria were: articles published in English and Portuguese; cross-sectional or longitudinal cohort studies; articles indexed on the following databases: ISI-Web of Science, PsycInfo, PubMed, ERIC, Latin American and Caribbean Health Sciences Literature (LILACS); articles published from January, 1975 to November, 2013. The choice for the year 1975 was defined by previous bibliographic survey, which indicated that year as to when the first article about the University of the Third Age programme was published, written by its creator Pierre Vellas (1975). The exclusion criteria were the following: descriptive and qualitative studies that did not present information about the sampling and analysis carried out or studies that did not mention that the research was conducted in a University of the

Third Age. Initially, all abstracts were separately assessed by two evaluators. Those approved by both researchers were included in the study. The ones for which they disagreed were submitted to a third evaluator. Fifty-one articles were found in the database ISI-Web of Science, 14 in PsycINFO, four in PubMed, 19 in ERIC and 25 in LILACS. After discarding the redundant cross-references, present in more than one database, 75 articles were then selected. From these, 37 articles were excluded, because it was not possible to obtain the full version of the studies. Considering all databases, 112 articles were retrieved.

The subjects of scientific literature can be classified, in brief, in three categories: (i) profiles of institutions and students, in addition to the enrollment reasons for the programme. Some studies mention the historical context of programme implementation; (ii) impact on the quality of life, on emotional health, on the ressignificance of old age and on the promotion of a successful and healthy old age; and (iii), impact on social ties and support networks. Empirical observation and evidence from research relate the benefits of education promoted by the Open Universities of Third Age on the quality of life of older people. They follow paradigms from educational gerontology, namely:

1. The participation in educational initiatives is correlated with keeping regular activities, increased satisfaction with life, improvement of perceived health and of cognitive skills among participants; all these elements are indicators of a successful ageing process;
2. They provide an opportunity for getting emotional, information and instrumental support, which can have a powerful effect on dealing with the inherent challenges of growing old and events of life;
3. They provide benefits to their daily lives, promote well-being, and rekindle motivation for learning, which might be dormant since their youth. They also contribute to the acquisition of new cognitive skills;
4. They promote feelings of well-being; afford the development of interpersonal relationships and have a positive impact on the life of older adults with regards to depression and social satisfaction;
5. They contribute to personal growth, provide work opportunities in the community, foster creativity and productivity; create social spaces and positive attitudes concerning old age;
6. The cognitive decline due to ageing might be offset by a gain in knowledge, since this gain acts as a powerful source of cognition enhancement and modulation at any stage of life.

In a study carried out by Cachioni (2003), the author mentions five potential benefits related to educational programmes in Brazilian universities:

1. The teaching and social interaction proposals from extension projects that are increasingly present in many higher learning institutions and universities, besides benefiting the older student, are an excellent place for promoting intergenerational contact. Even though they don't always take place in an intentional or planned manner, the programme activities provide young students, teachers,

administrators and politicians with an opportunity to understand and to verify, in practice, that education is not necessarily a privilege reserved to the youth, nor is it a unidirectional activity; it is, actually, an interactive, historical and ongoing process that takes place throughout one's life.

2. The programmes create opportunities for universities to re-examine their practices and educational goals, given the acquired knowledge from their contact with older students. The inherent challenge of this opportunity is, however, to proceed within this segment knowledgeably and effectively, applying a dialogical pedagogy to the teaching so as to make the most of the experience, the cognitive skills and the socioemotional skills acquired by older adults throughout their lives.
3. The presence of this new clientele creates new challenges for research, such as the biological, psychological and social characteristics of older people and of old age, as well as the description of the ageing process; the cognition and personality of older adults; their drive, interests, values and attitudes; social relationships and adjustment options for the older population. Many disciplinary and multidisciplinary fields have benefited from the conjecturing and questioning that emerge due to the close interaction with older people.
4. A new scenario arises for to applied research, not only regarding intellectual education, but also regarding education for health, for activities and productivity (ideals expressed by WHO for old age, mentioned in the World Assembly on Ageing), education for leisure and education for civic consciousness.
5. The advent and strengthening of the movement of the Open Universities for the Third Age provide a fifth benefit for a good ageing and longevity, as they become spaces that motivate and where studies are undertaken about the characteristics of the very institutions that provide educational services for older people, about their programmes, their policies and their human resources.

6.6 Future Perspectives for Older Adult Education

According to data of the Brazilian Institute of Geography and Statistics (IBGE), in 2020 Brazil will be the sixth country with the highest number of individuals who are over 60 years old. We will have approximately 28.5 million (15 %) of senior citizens in our population. The numbers are alarming, considering we are a country that hasn't yet been able to address the high level of illiteracy in the general population.

Estimates by IBGE show that illiteracy was present in 11.8 % of the Brazilian population in 2002, or approximately 14.6 million people. The data probably underestimates the real levels of illiteracy. The number of years of formal education, frequently used on observational studies and on these papers, does not assume that the individual has acquired cognitive or intellectual skills. The individual may have been to school and not have learned the needed skills to read, write, or solve mathematical operations.

The illiteracy rate is even higher among the Brazilian older population, which had less access to classes that teach how to read and write during childhood, as opposed to the current youth population. In a 2004 study, conducted in 204 Brazilian cities, that evaluated the educational level among older adults, it was observed that 27 % considered themselves illiterate, 18 % didn't receive formal education, while 22 % considered that reading and writing were arduous tasks (Oliveira et al. 2013).

This reality illustrates the importance of maintaining and increasing investments in formal education of the EJA/CIEJA type throughout the country. Education should more effectively contemplate the needed knowledge to an age group with unique characteristics and demands that represent the final stages of one's lifecycle. The concepts of development and ageing need to be recognized by teachers of adults and older adults as correlated processes.

As for initiatives related to non-formal education, particularly the Open Universities for the Third Age, they certainly will continue to represent the main learning initiative in educational gerontology in Brazil. However, some investments should be intensified with regards to the following issues:

1. Methodology and content of programmes: less orthodox ("bank teller") methodology (Freire 1987). Older adults cannot be mere recipients of knowledge; they should be active leading characters in the production of knowledge. It is important to establish active and problem-solving theoretical models. The issues of old age and ageing should be explored in-depth and widely discussed. Most programmes did not reach the third generation of Toulouse (when older people become partners and co-participants).
2. Research: Increase the scientific investment and publications in renowned and relevant scientific journals. Research should support the educational practice, as well as the development of teaching material.
3. Teacher Training: The teacher needs to be qualified in the area of gerontology and have scientific knowledge regarding the diversity of the participants.
4. Older student: As disseminators of knowledge.

Finally, it must be pointed out that respect for older people in Brazil is and will always be inevitably associated with investments in formal and non-formal education, whether in public or private institutions, changing the paradigm of education as something exclusive to children and youth.

References

- Alexandre, T. S., Cordeiro, R. C. I., & Ramos, L. R. (2009). Factors associated with quality of life in active elderly. *Revista de Saúde Pública* [Public Health Magazine], 43(4), 613–621.
- Bordenave, J. E. D. (1999). Alguns fatores pedagógicos [Some Pedagogical Factors]. In J. P. Santana, & J. L. Castro (Eds.), *Capacitação em Desenvolvimento de Recursos Humanos* [Human Resource Development Training] CADRHU. Natal: Ministry of Health/Pan-American Organization for Health/Federal University of Rio Grande do Norte Publishing House.

- Castro e Borges, P. L., Bretas, R. P., Azevedo, S. F., & Barbosa, J. M. M. (2008). Perfil dos idosos frequentadores de grupos de convivência em Belo Horizonte, Minas Gerais, [Profile of elderly attendees of community groups in Belo Horizonte, Minas Gerais State] Brazil. *Cadernos de Saúde Pública* [Reports in Public Health], 24(12), 2798–2808.
- Cachioni, M. (1998). *Envelhecimento bem-sucedido e a participação numa Universidade para a Terceira Idade: a experiência dos alunos da Universidade São Francisco*. [Successful aging and participation in a University for the Third Age: The experience of students at São Francisco University] Campinas: Masters dissertation in Gerontology. School of Education, State University of Campinas.
- Cachioni, M. (2003). *Quem educa os idosos? Um estudo sobre professores de universidades da terceira idade*. [Who trains the elderly? A study on professor at universities for the third age]. Campinas: Alínea.
- Cachioni, M. (2012). *Indicadores de bem-estar subjetivo e de bem-estar psicológico entre idosos participantes de uma Universidade Aberta à Terceira Idade*. [Indicators of subjective well-being and of psychological well-being among aged individuals enrolled in an Open University for the Third Age]. Habilitation thesis, School of Arts, Sciences and Humanities. University of São Paulo.
- Cachioni, M., & Ordonez, T. N. (2011). Universidade da Terceira Idade. In: Freitas, E.V.de & Py, L. (Orgs.). *Tratado de Geriatria e Gerontologia* (1): 1655–63. (3a ed.). Rio de Janeiro: Guanabara Koogan.
- Cachioni, M., Ordonez, T. N., da Silva, T. B. L., Tavares Batistoni, S. S., Sanches Yassuda, M., Caldeira Melo, R., et al. (2014). Motivational factors and predictors for attending a continuing education program for older adults. *Educational Gerontology*, 40(8), 584–596.
- Cardoso, A. S., Levandoski, G., Mazo, G. Z., Prado, A. P. M., & Cardoso, L. S. (2008). Comparação do nível de atividade física em relação ao gênero de idosos participantes de grupos de convivência. [Comparing the level of physical activity in respect to gender among elderly members of community groups]. *RBCEH*, 5(1), 9–18.
- Castro, P. C., Tahara, N., Rebelatto, J. R., Driusso, P., Aveiro, M. C., & Oishi, J. (2007). Influência da Universidade Aberta da Terceira Idade (UATI) e do Programa de Revitalização (REVT) sobre a qualidade de vida de adultos de meia-idade e idosos. [Influence of the Open University for the Third Age – UATI – and of the Revitalization Programme – REVT – on the quality of life of middle-aged and elderly individuals] São Carlos. *Revista Brasileira de Fisioterapia* [Brazilian Journal of Physical Therapy], 11(6), 461–467.
- Debert, G. G. (1997). *Reinventando o envelhecimento, socialização e processos de reprivatização da velhice*. [Reinventing aging, socialization and processes to re-privatize old age]. Department of Anthropology, IFCH. UNICAMP.
- DI Pierro, M. C. (2005). Notas sobre a redefinição da identidade e das políticas públicas de educação de jovens e adultos no Brasil. *Educação e Sociedade, Campinas*, 26(92), 1115–1139 (Especial out. 2005).
- Doimo, D. R., Silva, L. G., Azeredo-Oliveira, M. T. V., Franco, M. F., Bechara, E. N., & Pereira, A. S. (2010). *Análise comparativa do perfil socioeconômico epidemiológico e qualidade de vida dos alunos da Universidade Aberta à Terceira Idade do Instituto de Biociências, Letras e Ciências Exatas do campus de São José do Rio Preto/SP* [Comparative analysis of the epidemiological socioeconomic profile and quality of life of students from the Open University for the Third Age at the Institute of Biosciences, Humanities and Exact Sciences, campus São José do Rio Preto/SP] (UNESP-IBILCE): 2008, 2009 e 2010. Internal Distribution.
- Freire, P. (1987). *Pedagogia do oprimido*. [Pedagogy of the oppressed]. Rio de Janeiro: Paz e Terra.
- Hebestreit, L. (2008). The role of the University of Third Age in meeting needs of adult learners in Victoria, Australia. *Australian Journal of Adult Learning*, 48(3), 547–565.

- Irigaray, T. Q., & Schneider, R. H. (2008). Impacto na qualidade de vida e no estado depressivo de idosas participantes de uma universidade da terceira idade. [Impact on the quality of life and on the depressive state of elderly women enrolled in a university for the third age]. *Estudos de Psicologia* [Research in Psychology], 25(4), 517–525.
- Kretzer, F. L., Guimarães, A. C. A., Dário, A. B., Kaneoia, A. M., Tomasi, D. L., Feijó, I., et al. (2010). Qualidade de vida e nível de atividade física de indivíduos na meia-idade participantes de projetos de extensão universitária. [Quality of life and level of physical activity among middle-aged individuals participating in university extension projects]. *Revista Baiana de Saúde Pública* [Bahia Journal of Public Health], 34(1), 146–158.
- Neri, A. L. (1996). *Coping strategies, subjective well-being and successful aging: Evidences from research with mature and aged adults involved in an educational experience in Brazil*. In: 14th CONFERENCE OF THE ISSBD, Québec, Canada.
- Neri, A. L. (2001). Velhice e qualidade de vida na mulher. [Old age and quality of life for women]. In A. L. Neri (Ed.), *Desenvolvimento e envelhecimento* [Development and aging] (pp. 161–200). Campinas: Papirus.
- Oliveira, D. C., Neri, A. L., & D’Elboux, M. J. (2013). Variables related to the anticipated support for care in community-dwelling older adults. *Revista Latinoamericana de Enfermagem*. [Latin American Journal of Nursing], 21(3), 742–749.
- Palma, L. T. S. (2000). *Educação permanente e qualidade de vida. Indicativos para uma velhice bem-sucedida*. [Ongoing education and quality of life. Indicators for successful aging] University of Passo Fundo: UPF Publishing House.
- Pinto, G. K. (2009). *O Perfil dos alunos da Universidade Aberta à Terceira Idade da UNESP de Rosana e sua demanda por atividades de Lazer e Turismo*. [Profile of students of the Open University for the Third Age at UNESP, Rosana City, and their demand for Leisure and Tourism Activities] *Undergraduate Dissertation. School of Tourism*. São Paulo State University “Júlio de Mesquita Filho”: Rosana.
- Roque, F. P., Vinhas, B. R., Rebelo, F. L., Guimarães, H. A., Araújo, L. Z. S., Goulart, B. N. G., & Chiari, B. M. (2011). Perfil socioeconômico-cultural de uma Universidade Aberta à Terceira Idade: Reflexo da realidade brasileira? [Socio-economic and cultural profile of the Open University for the Third Age: Reflection of the Brazilian reality?] Rio de Janeiro: *Revista Brasileira de Geriatria e Gerontologia* [Brazilian Journal of Geriatrics and Gerontology], 14(1), 97–108.
- Rummert, S. M., & Ventura, J. P. (2007). Políticas públicas para educação de jovens e adultos no Brasil: a permanente (re)construção da subalternidade. [Public policies for education of youth and adults in Brazil: The permanent (re) construction of subservience]. *Educar Magazine*, Curitiba, 29, 29–45.
- Silva, F. P. (1999). *Crenças em relação à velhice, bem-estar subjetivo e motivos para frequentar Universidade da Terceira Idade*. [Beliefs toward aging, subjective well-being and reasons for attending the University for the Third Age.] São Paulo: Dissertation [Master’s Degree in Education]. School of Education, State University of Campinas.
- Soares, M. B. O., Tavares, D. M. D. S., Dias, F. A., Diniz, M. A., & Geib, S. (2010). Morbidades, capacidade funcional e qualidade de vida de mulheres idosas. [Morbidity, functional capacity and quality of life among older women]. *Anna Nery School*, 14(4), 705–711.
- Sonati, J. G., Modeneze, D. M., Vilarta, R., Maciel, E. S., Boccaletto, E. M., & Silva, C. C. (2010). Body composition and quality of life (QoL) of the elderly offered by the “University for the Third Age” (UTA) in Brazil. *Archives of Gerontology and Geriatrics*, 52(1), e31–e35.
- Sousa, M. G. C., & Russo, I. C. P. (2009). Audição e percepção da perda auditiva em idosos. [Hearing and perception of hearing loss among the elderly.]. *Revista da Sociedade Brasileira de Fonoaudiologia* [Journal of the Brazilian Society Speech Therapy], 14(2), 241–246.

Vellas, P. (1975). University of third age. *Lyon Pharmacy*, 26, 53–57.

Yassuda, M. S., & Silva, H. S. (2010). Participação em programas para a terceira idade: impacto sobre a cognição, humor e satisfação com a vida. [Participation in programmes for the third age: Impact on cognition, on mood and on satisfaction with life.] *Estudos de Psicologia* [Studies in Psychology] (Campinas), 27(2), 207–214.

Chapter 7

Canada

Pat Spadafora and Lia E. Tsotsos

7.1 Introduction

We live in a world that is growing older. By 2050, for the first time in history, there will be more people in the world over age 65 than under age 14 (United Nations 2013). Population ageing is arguably the most significant influence on public policy since the 1940s and is perhaps surpassed only by the digital revolution. The implications of this demographic shift are experienced in every facet of society including education, the labour force, income security, the economy, social services and healthcare.

Longevity is to be celebrated and compels us to reflect on our attitudes about ageing. ‘Active ageing’, ‘healthy ageing’ and ‘creative ageing’ are terms used to provide the lens through which we perceive ageing in today’s context. Over the last two decades, there has been a paradigm shift away from viewing ageing as a time of disease and decline to recognizing ageing as a time of creativity and continued growth. It becomes impossible, then, to discuss older adult education and lifelong learning without taking the demographic shift and other societal trends into consideration. Further, it is important to recognize that ‘older adults’ represent a heterogeneous group. One cannot compare the experiences, needs and interests of the youngest of the baby boomers with those of World War II veterans. In this chapter, the authors will encourage readers to free themselves of any preconceived notions they may have about the parameters of older adult education to fully embrace the reality that we can learn and grow until we take our last breath.

The chapter commences with a portrait of the Canadian context and, from there, will explore policy, research and practice as they relate to older Canadians. There will be a particular emphasis on our belief that lifelong learning should neither be

P. Spadafora (✉) • L.E. Tsotsos
Sheridan Centre for Elder Research, Sheridan College, Oakville, ON, Canada
e-mail: pat.spadafora@sheridancollege.ca; lia.tsotsos@sheridancollege.ca

‘date stamped’, nor limited to traditional learning settings. The chapter will conclude with the authors’ recommendations about future exploration into lifelong learning. Of course, in a country as large and diverse as Canada, one can provide only a few examples of the many aspects of older adult education and lifelong learning. It is hoped that the examples presented in this chapter provide a contemporary brief snapshot of the Canadian situation.

7.2 The Canadian Experience

Baby boomers are probably the most widely recognized and talked about generation in Canada. While most Canadian demographers define baby boomers as the generation born between 1947 and 1965, Statistics Canada (2012a) identifies those years as being 1946–1965. Regardless of the specific years, after the end of the baby boom, fertility rates dropped dramatically in Canada. This has far reaching implications for Canada’s population demographics. It is not difficult to imagine the impact, influence and expectations that baby boomers, the largest cohort at 28.6 % of the population in 2011, will have as they age. By 2031, all baby boomers will have reached the age of 65. Table 7.1 illustrates the number and percentage of Canadians in different generations.

In terms of understanding the past, present and future of older adult education and lifelong learning, however, our interest transcends the baby boom generation. In 2011, an estimated 5.0 million Canadians were aged 65-plus. That number is expected to double to reach 10.4 million by 2036. By 2051, about one in four Canadians is expected to be aged 65-plus (Employment and Social Development Canada 2011). In addition, the number of oldest Canadians are experiencing drastic increases. Figure 7.1 provides a portrait of actual and projected Canadian centenarians for between 2001 and 2061.

While the impact of this demographic shift will dominate the Canadian landscape for at least the next two decades, it is misleading to look at numbers only on the

Table 7.1 Generations in Canada (2011)

Generation	Age	Population	
		Number	Percentage
1918 and before	93 years and over	91,195	0.3
Parents of baby boomers (1919–1940)	71–92 years	3,074,045	9.2
World War II generation (1941–1945)	66–70 years	1,444,035	4.3
Baby boomers (1946–1965)	46–65 years	9,564,210	28.6
Baby busters (1966–1971)	40–45 years	2,823,840	8.4
Children of baby boomers (1972–1992)	19–39 years	9,142,005	27.3
Generation Z (1993–2011)	18 years and less	7,337,350	21.9

Source: Statistics Canada (2012a)

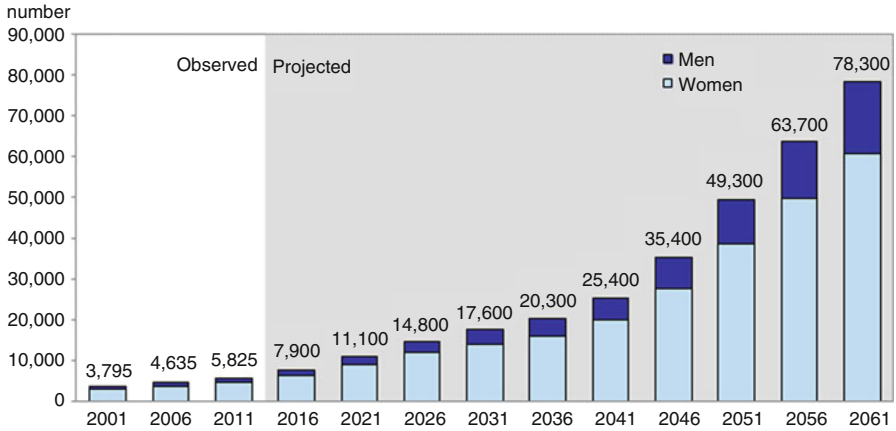
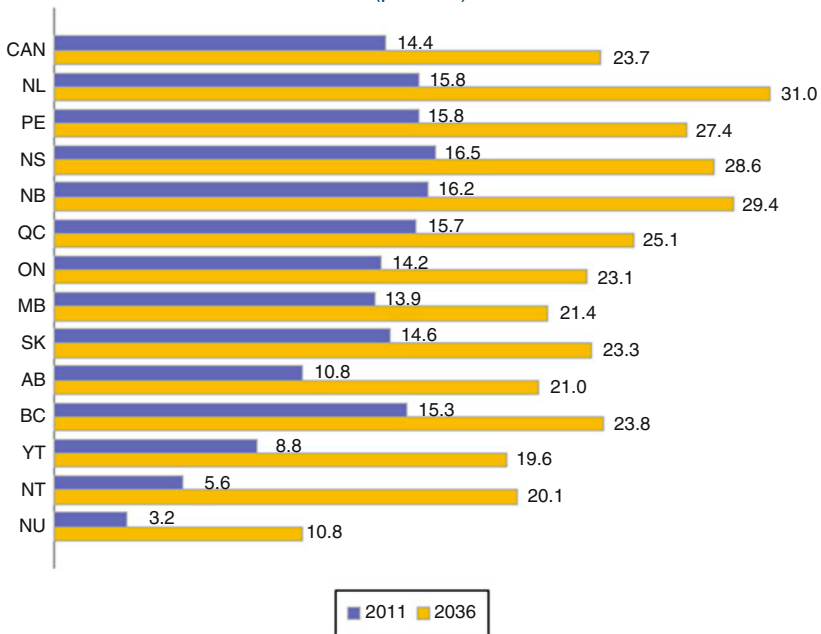


Fig. 7.1 Number of centenarians by sex, Canada (2001–2061) (Sources: Statistics Canada (2012b))

national level. Canada is a vast country with many geographic and regional disparities. The 2011 Census provides information on the projected increase in the percentage of the population aged 65-plus in the 2001–2036 by provinces and territories.

Population 65 years and over, by region, 2011 and projected 2036 (percent)



Source: Employment and Social Development Canada (2011)

Results demonstrate that Newfoundland, a small province on the East coast, is expected to have the largest percentage of adults aged 65-plus at 31 % – whilst Nunavut, a territory in the northern part of Canada, the smallest percentage at 10.8 %. Categorizing our population by age groups and provinces/territories paints only part of the Canadian picture. There are many other variables that come into play including, among others, climate, geography, rural/urban trends, socio-economic status, cultural and ethnic diversity, and first languages spoken. Indeed, there are various societal trends that contribute to the experience of ageing and, as a result, shape the ways in which we conceptualize the ‘what, where, why, when and how’ of older adult education. For instance, one should not underestimate the pervasive influence of technology. Recently, (i) the Internet, (ii) PC/laptop computers, (iii) mobile phones, and (iv) email were deemed by Canadians to be the top 4 innovations – in that respective order – which changes life most dramatically during the past 30 years (Knowledge@Wharton 2009). In Canada however, access to these technologies, particularly with respect to the Internet, remains a complicated issue. While residents in urban areas have no problem getting online, as soon as you move out of cities and into more rural communities, the infrastructure required for Internet access is inadequate. Most rural towns in Canada do not have broadband Internet, with many still relying on ageing dial-up connections, if they have the Internet at all. Although this reality is not limited to Ontario, the most striking thing is that these rural communities may only be an hour outside of large metropolitan areas such as the Greater Toronto Area – hence, not especially rural when you consider the vastness of a country like Canada. This problem is one that urban developers and city planners are struggling to rectify to ensure that all Canadians are able to access and benefit from the Internet.

7.3 Older Adult Education and Lifelong Learning

Learning can be formal or informal. Formal learning opportunities are often, but not always, affiliated with boards of education, colleges, universities and community-based organizations and can fairly easily be identified and documented. Informal opportunities are not constrained by traditional organizational structures; however, their very informality makes them difficult to document. Informal opportunities can range from the group of self-named ‘gals’, 15 women from Oakville and the Toronto area who have regularly convened in each other’s living rooms for over 40 years, bringing in guest speakers and occasionally going on cultural excursions with individuals who choose to learn by listening to the radio, surfing the Internet and reading newspapers. It is important not to be limited by traditional notions about what constitutes older adult education and lifelong learning. Perhaps a useful way to distinguish between the two is to consider older adult education as a more institutionalized form of learning such as one might find in second career, re-training programs, basic adult education upgrading or other credentialed learning and lifelong learning as the informal opportunities that present themselves throughout

the life course. Even that distinction has its limitations as many third-age learning programs operated by older adults themselves are formalized and affiliated with colleges and/or universities. Terminology will continue to pose a challenge as learning and, even education, mean different things to different people.

Interest in lifelong learning in later life in Canada is not as widely studied or funded as one might expect. One recent study conducted under the auspices of the Sheridan Centre for Elder Research (Spadafora 2009), which explored the learning needs and interests of Ontarians aged 65-plus, did not want to presume a shared understanding of the definition of learning. Hence, the first question asked to questionnaire recipients included: “What does learning mean to you?”. As expected, responses were rich and varied:

Learning makes life exciting. I was taught by my parents to appreciate and love learning. Learning brightens a dull day, eases the trouble that comes with age... Constant communication with other people and reading of newspapers and TV and radio media on current affairs and learning channels... Learning contributes to my health. To keep on learning means you are involved in living and are still capable. Perhaps it makes you an interesting person to be around. (Spadafora 2009: 13)

The study found that the ability and desire to learn does not diminish with age. As one informant asserted, “It means that I’m never going to stop being curious, that I’m never going to be satisfied until I learn everything there is to know about any topic or subject and that we’re never too old to learn!”. Moreover, for these older Ontarians health problems do not necessarily impede interest in learning. As commented by one focus group participant “My problem is physical... I’ve had a stroke too, my voice is gone but I’m still available to learn because I’m still living”. Indeed, regardless of how one defines learning, or whether it is formal or informal, it is just as important to encourage lifelong learning to support cognitive function as it is to encourage physical exercise to support functional independence.

7.4 Policies and Jurisdictional Responsibilities

Beyond a certain age, older adults themselves are the prime drivers of older adult education and lifelong learning. Even when programmes state that they are open to adults of a particular age and older, in practice, one finds participation heavily clustered around the baby boom generation with a diminishing number of participants at older ages. The authors recognize that there won’t be as many potential participants at advanced ages but believe that there could be much more done to encourage increased participation. Ageism remains a subtle barrier to participation in older adult education. Whilst one finds great improvements, outdated stereotypes about and attitudes towards ageing still come into play in today’s society.

Governments at all levels continue to play a significant role in adult education and have an important information and communication role for learners of all ages. The Canadian government website (<http://www.seniors.gc.ca>) provides a rich resource of information and services available to older Canadians. The site, broken

down by provinces and territories, has a great deal of information, but one still has to search to find information relevant to older adult learning. In the Ontario section, for example, there is a *Guide to Programs and Services for Seniors in Ontario* (Ontario Seniors Secretariat 2014) that includes a chapter on “Active Living”. The chapter references lifelong learning within the domain of school boards, universities and community colleges. It also refers to the Third Age Network (described in more detail below) as self-managed groups of older adults who share learning. The British Columbia site also includes a *Seniors’ Guide* (British Columbia Government 2012), the 10th edition of which was published in 2012. The British Columbia guide has a section about specific questions to ask yourself as you plan for healthy ageing. Of pertinence to this chapter is the question that asks, “Have you thought about lifelong learning and what new skills or knowledge you want to gain?” Other provinces and territories have similar information available on the federal government website and also on similar sites within their own jurisdictions.

From a government perspective, awareness of the importance of an ageing population took a leap forward in 1972 with the introduction of the *New Horizons Seniors Program* that is supported by Health and Welfare Canada. Presently, for projects to be funded, they must be led or inspired by seniors, and address one or more of the following five objectives: (i) promoting volunteerism among seniors and other generations; (ii) engaging seniors in the community through the mentoring of others; (iii) expanding awareness of elder abuse, including financial abuse; (iv) supporting the social participation and inclusion of seniors; and (v), providing capital assistance for new and existing community projects and/or programs for seniors. While these programme objectives do not explicitly focus on lifelong learning, many of the funded projects implicitly address dimensions of late-life learning.

Although the federal government plays an influential role, education falls under the exclusive jurisdiction of provinces and territories. The Ministers of Education have provided national leadership in Canada for over 45 years. In April, 2008, the Council of Ministers of Education, in a joint ministerial statement, published a report, *Learn Canada 2020* (Council of Ministers of Education, Canada 2008), which identified the four pillars of what they refer to as ‘lifelong learning’ – namely, early childhood education and development, elementary and secondary schooling, postsecondary education, and adult learning and skills development. However, similar to many other sources that reference adult learning and/or lifelong learning, opportunities for older adults at more advanced ages are limited. In addition to federal government initiatives, each province has a Ministry of Education and municipal school boards. Typically, adult learners do not have an organized voice to support their interests. Education, from the perception of the general public, usually means elementary, secondary or post-secondary institutions and, as a result, the education needs of older adults tend to exist outside public consciousness.

7.5 Non-government Organizations

There are many organizations and persons who have contributed to the growth and development of older adult learning in Canada. This chapter provides two examples: the Third Age Network and Eldercollege. The Third Age Network is composed primarily of late-life learning groups that take part in self-directed learning. One of their objectives is to eventually be in a position to lobby the government for better access to continued learning for older adults. While the network is in its infancy (founded in 2007), its membership includes close to 6000 older adults. One of the institutional members of this network is Ryerson University's not-for-profit LIFE Program for individuals aged 50-plus. The LIFE program, based in Toronto, offers 'Lecture Courses', delivered by professors or experts in a given field, or 'Moderator-Led Courses', which are, in many ways more interesting. The 'Moderator-Led Courses' allow LIFE programme members to become course leaders themselves, volunteering their time to help support learning among their peers. This kind of model, where lifelong education is supported and encouraged by age-matched peers, holds great appeal as it has the potential to engage older adults in learning activities at multiple levels. It is promising to see that many of the other groups that are part of the Third Age Network offer similar types of opportunities.

Eldercollege, affiliated with Capilano University in British Columbia, celebrated during the 2011–2012 academic year its 20th anniversary as an educational community open to men and women aged 55-plus. Eldercollege has been a positive example of peer-led learning, and provides learning opportunities for individuals interested in self-directed education, and who want to contribute to the social and cultural development of their communities. In fact, participants design and offer peer-led quality educational activities to stimulate interest in learning and to provide a forum for sharing ideas and knowledge, and with activities being planned and operated by members themselves to maintain high quality at low cost.

These two examples demonstrate that older adults are themselves taking great initiative in creating groups and organizations that promote learning opportunities as there appear to be very few institutions that provide true 'lifelong learning' opportunities. Only a few post-secondary institutions support later life learning on their campuses with staff members dedicated to that type of programming. Some do provide support in terms of meeting space but, other than that, they do not necessarily see older adult education as part of their mission. There is no government funding to operate such programs and older adults often cannot afford to pay course fees, even when these costs are reduced. There are organizational challenges with local lifelong learning groups. In order for them to exist, they must address governance issues while relying on their members to be actively involved in the planning and running of programs needed for ongoing sustainability. Some groups have established not-for-profit organizations but many more are led by dedicated volunteers. Once that champion is no longer involved, sustainability can become problematic. Moreover, another reality related to older adult education today is the prevailing perception that programmes necessarily must be affiliated with post-secondary

institutions or the aforementioned self-directed third age learning groups. This notion is based on past practice but is limiting in scope. It ignores learning activities offered by, for example, older adult centres, libraries and seniors' recreation centres. In addition, if we truly mean 'lifelong' when we talk about lifelong learning, we need to bring retirement and long-term care homes into the conversation. An excellent example in this respect, is the innovative 2013 partnership between Ryerson University and the Baycrest Centre for Geriatric Care in Toronto, Ontario. The goal is to help Baycrest develop the Baycrest Learning Academy for individuals who live in their Homes for the Aged and seniors' residences. The partnership is unique and a model that may pave the way for other retirement and long term care homes. Care facilities offer recreation programs and physical exercise programs and are beginning to understand that the mind needs exercise and stimulation too!

7.6 Research and Funding

A major funding body whose mandate focused specifically on learning was the Canadian Council on Learning (CCL). Funded by the federal government, CCL was launched in 2004 and, while funding ceased in 2009, formally closed its doors in the spring of 2012. At that time, the Board of Directors approved a motion to dissolve the not-for-profit organization. Through an agreement with the University of Ottawa, the Intellectual Property of CCL was transferred to the university to ensure that interested parties had access to reports funded by and created for CCL. A CCL consortium of interested institutions from across Canada continues to exist. Research and knowledge mobilization represented one of CCL's three key areas of focus. Within the research area, adult learning was one of seven themes to which CCL made financial contributions. It is interesting to note that, within adult learning, there was little focus on older adult learning. Of 15 projects funded in 2006, only one focused on older adults. That research was conducted, as previously mentioned in this chapter, by the Sheridan Centre for Elder Research. Eight projects related to adult learning were funded in 2007; none directly addressed older adult learning.

One of the four methods of data collection in the Centre's 2006 study was a detailed questionnaire. At that time, the questionnaire was distributed primarily as hard copies. Although there was an online version of the questionnaire on the Centre's website, there was very little uptake with the online option. There were 475 respondents to the 2006 questionnaire. In 2013, the same questionnaire was again distributed, exclusively online, this time with a national audience of Canadians aged 65-plus in mind. Our goal was to learn about changes that may have transpired in the intervening years. This time around, the study registered nearly 400 respondents to our online survey, quite the change from 7 years ago. Approximately half the respondents currently attend formal learning classes/groups, which is double the 25% reported in 2006. The most popular community-based learning settings reported were 'community/recreation' or 'arts/cultural' centres. Nearly all respondents reported that it was 'somewhat important' or 'very important' to learn new things,

and 94 % considered themselves 'open' or 'very open' to new ways of learning. An interesting difference between the current and 2006 results is that whilst 'playing games on the computer' was one of the top 3 computer activities reported by the 2006 group, in contrast playing games fell to one of the least popular activities, with 'Google searches', 'word processing' and 'banking' being more popular (for both sets of respondents, email was the top ranked choice, and general reading was in the top 3). This change reflects the drive for many people to seek information online, which surely impacts their choices and decisions when choosing programmes or classes to attend.

In addition to the aforementioned research, the Centre also received a smaller grant from CCL's Adult Learning Knowledge Centre (ADLC) to explore learning for personal development in retirement. Questionnaires about continued learning following retirement were mailed to 284 Sheridan College retirees. Fifty-seven completed questionnaires were returned, and although the sample size was small, results serve to underscore where older adults learn and how they want to learn. The sample consisted of 31 males and 26 females ranging in age from 54 to 84 years. Participants were asked to indicate 'where' they currently learned (they could check multiple options). All of the following sources of information (presented in order of decreasing frequency) were used by over 50 % of the sample: print media, television, library, informal discussions, travel, workshops/lectures, websites, volunteering, radio, art galleries, clubs/organizations and museums. This wide range of learning locales points towards the increasing individual nature of learning styles and the multitude of ways that older adults can be engaged in learning activities. Participants were also asked to indicate 'how' they 'preferred' to learn new information. The overwhelming top choices, selected by over 75 % of the participants, were learning in small groups or through print material. Other popular options included learning informally through friends/family, face-to-face, online or on television. Formal education settings were ranked second lowest in popularity, higher only than radio, suggesting that policy makers and service providers should explore more options for creating informal learning opportunities, rather than focusing solely on formal learning settings.

Related to the field of informal learning, one noteworthy example is The Research Network on New Approaches to Lifelong Learning (NALL). Funded between 1996 and 2002 by the Social Sciences and Humanities Research Council (SSHRC) and comprised of more than 50 researchers and collaborators, NALL delivered rich data, both qualitative and quantitative, on the subject of lifelong learning with a particular emphasis on documenting informal learning activities, the relationships between formal and informal learning and the barriers that impede recognition of informal learning. The 'NALL Working Papers: Annotated Bibliography of Studies Based on Data from the Research Network on New Approaches to Lifelong Learning' was edited by David W. Livingstone and produced in 2006 (Livingstone 2006). It would appear that the focus of the work was still targeted at 'younger' older adults but, nonetheless, the results of the research projects are relevant today and provide food for thought. For instance, the NALL group completed the first national survey of informal learning in Canada and one of their main findings was

that Canadians spend, on average, 15 h per week on informal learning. When one considers that a part-time job is typically 24 h per week, this is a significant amount of time and again reinforces the need to create sufficient informal learning options for all older Canadians.

In general, tracking funded research about lifelong learning is a challenge, in part, due to terminology. In addition to the previously referenced CCL, there are other federal (e.g. Social Sciences and Humanities Research Council (SSHRC)) and provincial funding bodies (e.g. Ontario Trillium Foundation) that, in effect, financially resource projects that directly or indirectly are related to lifelong learning. The challenge is that they do not necessarily use the term 'lifelong learning' to describe the nature of the research. The result is that one really has to dig deep to unearth projects that have, at their core, older adult education and lifelong learning as outcomes. In addition to federal and provincial funding bodies, there are some foundations and corporations with an interest in funding education, research and other issues of concern to older Canadians. Again, although they may not specifically address older adults in their funding criteria, such research may include proposals in this area.

7.7 Creating the Future

The national motto of Canada is 'from sea to sea', which refers to the vastness of Canada by referencing the eastern, western and northern sea borders of the country. As has been discussed in this chapter, Canada's varied and diverse population and geography make for a truly colourful picture of older adult education and learning. This chapter attempted to capture a snapshot of some of the important historical contexts that have shaped Canadian work in this area, as well as current initiatives that are engaging older adults and encouraging them to take control of their own learning activities. Older Canadians are not simply participating in older adult learning possibilities but are also initiating programmes that cater to the learning needs of older citizens. However, high-income baby boomers and retirees, living in urban areas, appear to be the prime beneficiaries of older adult learning programmes. They are generally better educated, understand and know how to navigate the education system, know how to find opportunities of interest to them and can generally afford to participate. For a variety of reasons, those with lower incomes tend not to participate and those with less education may be intimidated by the current system. As referenced in other chapters in this volume, it is important to look towards the future, and hence this chapter concludes by proposing several areas for future research:

Health Benefits of Older Adult Education The health benefits of physical exercise are well documented and promoted through organizations like ParticipACTION: Let's Get Moving. Under the ParticipACTION umbrella, public, private and the

not-for-profit sectors in Canada have collaborated for over 30 years to encourage Canadians to integrate physical activity into their everyday lives. However, far fewer people are aware of the many health benefits of lifelong learning. Advocacy for a national strategy similar to ParticipACTION merits serious consideration.

The Benefits of e-Learning in Later Life Technology enables us to create learning opportunities that extend beyond traditional physical space. This chapter has just scratched the surface in thinking about the possibilities of online learning and creating communities of learners in novel ways. Further, many older Canadians live on fixed incomes and cost can become a barrier to participating in lifelong learning. Technology has the potential to open the world, and augment participation levels in older adult education, at a relatively low cost.

Learning and the Baby Boomer Generation The baby boom generation, as they age, will shape the learning landscape in Canada. As a cohort, they will redefine retirement. Boomers represent a tremendous resource of human capital. As such, there may be an opportunity to coach retired executives and other baby boomers to develop and lead innovative lifelong learning programs to a greater extent than has been past practice. The fact that many seek volunteer activities but want experiences that both meet a need and build on their skill sets is to be noted and acted upon.

Theory of Older Adult Learning Society at large believes that education is for younger people and for the primary purpose of seeking employment. There has been relatively little attention paid to developing a theoretical perspective on later life learning as it concerns individuals living in retirement and long-term care homes. There should be a greater emphasis not only on providing learning opportunities in retirement communities and long-term care homes, but also on conducting further research about how best to respond to the needs and interests of adults living in care.

Literacy Levels in Later Life Although this will change over time, the highest percentage of Canadians with low literacy skills are older adults. This is, in part, because many Canadians aged 65-plus did not have the opportunity to complete primary school. Unfortunately, Canada is one of the few industrialized countries without a coordinated national system of adult basic education. It is recommended that all levels of governments and key stakeholders collaborate to develop a national strategy on basic adult education that includes older persons.

Higher Education for Older Adults With the abolition of mandatory retirement in Canada, many baby boomers are working longer by choice and/or by necessity. Post-secondary institutions would be strategic in considering programs that will best meet their needs. These could be traditional credit courses and/or retraining opportunities. However, it may be a different kind of training altogether that acknowledges the life and work experience that older adults bring to the learning environment. Embarking on a new career in later life is just one possibility for baby boomers.

Without doubt, further exploration of these areas will advance the state of older adult education in Canada, while also having meaningful impacts on older adults themselves. It is solely by linking research, policy and good practice in lifelong learning, that the state of older adult education can be advanced and improved.

References

- British Columbia Government. (2012). *Seniors' guide*. http://www2.gov.bc.ca/assets/gov/topic/AE132538BBF7FAA2EF5129B860EFAA4E/pdf/seniors_guide_2012_eng.pdf. Accessed 18 Dec 2014.
- Council of Ministers of Education, Canada. (2008). *Learn Canada 2020: Joint declaration, provincial and territorial Ministers of Education*. <http://phase2.cmec.ca/Publications/Lists/Publications/Attachments/187/CMEC-2020-DECLARATION.en.pdf>. Accessed 18 Dec 2014.
- Employment and Social Development Canada. (2011). *Canadians in context – Aging population*. <http://www4.hrsdc.gc.ca/.3ndic.lt.4r@-eng.jsp?iid=33>. Accessed 18 Dec 2014.
- Knowledge@Wharton. (2009). *A world transformed: What are the top 30 innovations of the last 30 years?* <http://knowledge.wharton.upenn.edu/article/a-world-transformed-what-are-the-top-30-innovations-of-the-last-30-years/>. Accessed 5 Nov 2012.
- Livingstone, D. W. (2006). *Annotated bibliography of studies based on data from the research network on new approaches to lifelong learning*. NALL Working Paper Toronto: Centre for the Study of Education and Work, OISE/UT. <http://www.wallnetwork.ca/resources/Nallwp2006.pdf>. Accessed 18 Dec 2014.
- Ontario Seniors Secretariat. (2014). *A guide to programs and services for seniors in Ontario*. <http://www.seniors.gov.on.ca/en/seniorsguide/index.php>. Accessed 18 Dec 2014.
- Spadafora, P. (2009). *As seen through their eyes: The learning needs of Ontario elders*. Ontario: Sheridan Elder Research Centre. <http://www.ccl-cca.ca/pdfs/fundedresearch/Spadafora-FinalReport-AdL2006.pdf>. Accessed 18 Dec 2014.
- Statistics Canada. (2012a). *Generations in Canada, 2011 (table). Generations in Canada; Age and sex, 2011 Census*. Statistics Canada Catalogue no. 98-311-X2011003. Ottawa. http://www12.statcan.gc.ca/census-recensement/2011/as-sa/98-311-x/98-311-x2011003_2-eng.pdf. Accessed 18 Dec 2014.
- Statistics Canada. (2012b). *Number of centenarians by sex, Canada, 2001 to 2061 (graph). Centenarians in Canada; Age and sex, 2011 Census*. Statistics Canada Catalogue no. 98-311-X2011003. Ottawa. http://www12.statcan.gc.ca/census-recensement/2011/as-sa/98-311-x/98-311-x2011003_1-eng.pdf. Accessed 18 Dec 2014.
- United Nations. (2013). *World population prospects: The 2012 revision*. New York: United Nations.

Chapter 8

Chile

**Pedro Paulo Marín Larraín, Macarena Rojas Gutiérrez,
Francisca Campos Torrealba, and Javiera Sanhueza Chamorro**

8.1 Introduction

The ageing of the population has become a global phenomenon, produced mainly by the reduction in mortality and fertility, migration changes, and increased life expectancy and longevity, due largely to scientific, technological, and social-health advances. Individually speaking, ageing is an irreversible process that affects multiple layers of a person, from biological to psychological and social aspects. These two sides of ageing (population and individual sides) make for a complex and multidimensional phenomenon, which brings with it various consequences and challenges for ageing people as well as for society as a whole. Chile, like other Latin American countries, is characterized by a much faster ageing process than that traditionally experienced by developed countries. According to last National Socio-Economic Survey (*Encuesta de Caracterización Socioeconómica Nacional*) (Ministerio de Desarrollo Social 2011), over the past 20 years the population of people 60 or older has doubled in absolute terms, now constituting more than 2,600,000 people, equivalent to 15.6 % of the total population. This number is projected to reach nearly 18 % by 2025. These projections are backed up by the Economic Commission for Latin America (ECLAC), which noted that in 2025 the country will have the highest rate of ageing in the region, above Argentina and Uruguay, who have traditionally had higher ageing rates.

P.P. Marín Larraín (✉)

Departamento de Medicina Interna-Geriatria, Facultad de Medicina, Pontificia Universidad Católica de Chile, Santiago, Chile
e-mail: ppmarin@med.puc.cl

M. Rojas Gutiérrez • F. Campos Torrealba • J. Sanhueza Chamorro
Programa Adulto Mayor, Pontificia Universidad Católica de Chile, Santiago, Chile
e-mail: mrojasu@uc.cl; frcampos@uc.cl; jsanhuezac@uc.cl

Against this backdrop, addressing the phenomenon of an ageing population, with its many political, social, cultural, and economic implications, gains importance and poses many challenges for the near future. This phenomenon is understood not only as a demographic change but as a radical transformation of society with many complex aspects that obliges us to rethink spaces for social participation, social policies to support vulnerable groups, labor and social security structures, family relationships, cultural and material needs, etc. One of the important elements in stimulating processes of social change, inclusion, and participation in older adults is education. In Chile, and Latin America in general, education for seniors became a topic of discussion starting in the 1980s, when some academic institutions created university programmes for seniors based on the European model, which at that point already had about 10 years of experience in the development of various educational models. Since then, the issue has been under ongoing development and discussion both in Chile and worldwide. A number of international agreements have been created at global assemblies on ageing. These agreements incorporate the education of senior adults as a key element in their rights and ability to be an active part of society.

However, despite this auspicious context, in Chile senior education is still far from being a right. Chile is a country where the senior population and society in general have many needs, and the government cannot always cover them properly through public policies and social security. But with the accelerated ageing of the Chilean population, the government, society in general, and especially seniors themselves have begun to demand senior rights. First are those necessities such as health, pensions, and housing, and secondly, the rights to education, participation, and integration, among others.

8.2 Conceptual Theoretical Framework

Senior education in Chile, as an area of social intervention, is a relatively new field of action that came into being in the late 1980s, based on international meetings held by United Nations Educational, Scientific and Cultural Organization in 1979 and the first World Assembly on Ageing held in Vienna in 1982 (United Nations 1983). These meetings gave birth to the first guidelines for governments and civil society to address this issue as crucial for the development and full inclusion of senior adults. These guidelines revolve around two main ideas. The first is to value and encourage the contributions that older adults can make to society as transmitters of knowledge, culture, and spiritual value, and the second is to incorporate education as a basic human right throughout life, as a way to fully integrate into society, a tool to face the ageing process, a creative use of time, and form of access to life-long learning for those who had no access to education at other stages of life (ibid.). It also stresses that education should promote non-discrimination towards older persons. Internationally, in the 1960s, United States begins with some initiatives for older people developing cultural and educative activities, specially in the recreational area. Then in the 1970s, senior adult education arose in Toulouse, with the

creation of university programmes which then spread throughout Europe and other regions (Villar et al. 2006). Moreover, in 1975 one witnessed the formation of International Association of Universities of the Third Age (IAUTA), which groups more than 3000 experiences of universities that develop educational programs for older people.

Following these models, the first universities in Chile that made efforts in this area were the Universidad de Valparaíso and Pontificia Universidad Católica de Chile, which created their own programmes. In addition to universities, other actors became involved in senior education. Non-governmental organisations, foundations, municipalities, and civil society organizations have developed various educational initiatives geared towards this age group.

8.3 Regulatory Framework and Social Policies Aimed at Older Adults in the Field of Education

The Constitution of the Republic of Chile (*Constitución Política de la República de Chile*) the General Law of Education (*Ley General de Educación*) recognize the right of seniors to education, but with some limitations. While in the Constitution the article No. 10 of Title III of Rights and Constitutional Duties states that “the goal of education is the full development of a person in the different stages of his or her life” (Biblioteca del Congreso Nacional 1980: 12) it only establishes educational conditions for pre-schoolers, children, and young adults, which shows that, in reality, this legislation does not provide for the active social participation of other age groups.

The General Law of Education (Law 20,370) sheds more light on the framework into which education of older persons could be integrated. Article 2 of paragraph 1 of the Preliminary Standards Preliminary Title states that: “education is an ongoing learning process that encompasses the various stages of life (...) enabling people to responsibly, democratically, and actively live and participate in a society” (Biblioteca del Congreso Nacional 2007: 1). Considering, then, that the current educational system has not set its legal focus beyond the socialization of children and youth, the initiatives proposed for older adults, so far, have been isolated initiatives promoted by each entity individually, with programmes ranging from literacy to courses and workshops on recreation, culture, and personal development, among other areas, taught in universities and other institutions.

However, in the past year, the Chilean government developed an initiative that will be changing the country’s perspective on seniors. The year 2012 saw the passing of the *Integral Policy on Positive Ageing for Chile 2012–2025* (*Política Integral de Envejecimiento Positivo para Chile 2012–2025*) (Servicio Nacional del Adulto Mayor 2012), which is a government policy on ageing and older persons in the country. While the policy’s main aims are to protect the functional health of older adults, improve their integration into the various areas of society, and increase their

levels of subjective well-being (priority issues for a population considered vulnerable), it also specifically aims to improve educational achievement and job training for seniors and increase seniors' opportunities to participate in social, recreational, and productive activities. It establishes some short, medium, and long-term goals for improving senior adults' participation and education in Chile.

8.4 Actors Involved in Senior Adult Education

In Chile, the main courses of educational action have been quite specific. Literacy and remedial education, recreational education, use of free time, culture, leadership, and participation are recurring themes in senior education. There are also movements to raise awareness of ageing, promote healthy lifestyles, and, recently, promote the use of new information technologies. The main promoters of this have been government programmes, municipalities, senior citizen associations, NGOs, private institutions, and some universities.

8.4.1 *The National Government through the National Service for the Elderly*

The National Service for the Elderly (Servicio Nacional del Adulto Mayor – SENAMA) is a public service, created in 2002 via Law No. 19,828 (Biblioteca del Congreso Nacional 2002), which is responsible for helping improve the quality of life for older people in Chile (Servicio Nacional del Adulto Mayor 2002). The same law that created the Service defined an older person as anyone who has reached the age of 60, with no difference between men and women. Adhering to the mission of promoting public participation, rights, respect, and appreciation of older persons, SENAMA is also concerned with providing educational opportunities. It defines educational activities as all “activities that promote health, healthy eating, physical fitness, psychomotor development, learning of knowledge and skills, and general instructional activities” (SENAMA 2013: 8).

The programmes aimed at promoting education are: The Links Programme (*Programa Vínculos*), which aims to help connect older persons with their local environment through education, as a space providing useful tools to address the individual ageing process; the National Fund for the Elderly (*Fondo Nacional del Adulto Mayor*), a competitive fund to promote self-management among older adults who participate in civil society organizations to apply for funding of educational and training activities; Leadership training programme (Programa para la formación de dirigentes) aimed at training senior leaders for positive leadership and management of relevant information on national and regional public offerings, in order to promote inclusion and active participation; and the Meeting Houses (*Casas Encuentro*), centres for older persons with training, recreational, and cultural activities like

physical and intellectual workshops, personal development workshops, and digital literacy workshops, among others. Since 2013, their subject matter has been focused on promoting positive ageing among older adults in vulnerable situations.

8.4.2 Municipalities

Another major player in higher education in Chile is the municipalities, the equivalent of city councils or local governments in other countries. Since the early 1990s, numerous municipalities have been actively involved in the development of initiatives promoting the welfare of older adults in their communities. First, areas with high older populations started generating small isolated initiatives, which gradually transformed into established programmes and centers.

These initiatives have been expanding since 2000 and today, virtually all municipalities in the country have an office, department, or area for older persons, under the Department of Community Development (Dirección de Desarrollo Comunitario – DIDECO), a body concerned with, among other things, promoting educational activities for seniors. But even today there are disparities among municipalities in terms of access to these programmes. In a recent public accounts review of some of these local units, one can observe, for example, that in districts with a consolidated offering and more allocated resources, 14 % of older persons participate, while in municipalities with fewer resources and recent programmes, coverage can reach levels of close to 2 % of the local population (Ilustre Municipalidad de Puente Alto 2013). This is demonstrated in the following data:

- Commune 1 Metropolitan Region: Total workshops 339, participants 5541 (total commune population 282,000 inhabitants/Seniors more than 38,000). Coverage: 14 % of the commune’s total population.
- Commune 2 Metropolitan Region: Total workshops 47, participants 596 (total commune population 586,000 inhabitants/Seniors more than 30,000). Coverage: 2 % of the total population of the commune.

8.4.3 Public Corporations: Non-governmental Organisations and Foundations

The issue of education is also addressed at the level of civil society, i.e. in different social foundations and organizations working with seniors. The most experienced and well known institutions in the country, such as Fundación Amanoz, Fundación Las Rosas, Fundación Consejo Nacional de Protección a la Ancianidad (CONAPRAN), Hogar de Cristo, and Caritas Chile, offer workshops to seniors in the areas of personal development, cognitive development, recreational and cultural activities, and spiritual development. These workshops are geared towards fostering positive ageing, especially for the older adults residing in these institutions.

8.4.4 *Private Corporations: Caja de Compensación*

Another important actor in older adult education in Chile are the Cajas de Compensación. There are private, non-profit corporations that manage social security benefits for Chileans. The five Cajas that exist nationwide (Caja Los Héroes accounts for 41.6 % of pensioners in the country, Caja Los Andes for 26.6 %, and Caja La Araucana for 18.3 %) offer mainly recreational workshops for their pensioners so that they can develop physical, manual, and cognitive skills to improve their quality of life.

8.5 Description of Educational Initiatives and University Programmes for Older Adults in Chile

As mentioned previously, the Universidad de Valparaíso and the Pontificia Universidad Católica de Chile were the pioneers in creating educational programmes for seniors. Both served as references for other universities' initiatives for older adult education. Unfortunately, a number of educational initiatives did not develop into permanent programmes, due to the limited programmatic and financial support they received from the institutions.

A 2013 national poll on current programmes and initiatives verifies that the Pontificia Universidad Católica de Chile has continued with its Older Adult Programme, and two other universities: the Universidad de Santiago de Chile and the Universidad para la Tercera Edad (U3A). The initiatives of other universities tend to be ideas or activities with limited time periods, and do not result in established programmes like the aforementioned examples. The Universidad de Concepción, Universidad del Bío-Bío, Universidad de Valparaíso, Universidad Católica del Maule, Universidad de La Serena, and Universidad Austral de Chile offer educational activities like courses and workshops and summer or winter schools.

In Chile there are three main pillars in university activity: 'teaching', 'research', and 'outreach'. The latter refers to the university's connection with the community and participation in its changes. Thus, most programmes for seniors arise from the "outreach" pillar, in departments that offer undergraduate degrees that deal with the topic of ageing. Moreover, the issue of ageing has been developed in the "research" pillar, where scholars interested in the subject conduct different studies or create scientific observatories that generate data and analyses to contribute to public policy. In the country there are very few observatories of this kind, because they are subject to funding from grants. In other words, they do not have stable funding. An example is the Universidad Católica del Maule's 'Observatory on Ageing, Culture, and Rurality'.

In general, universities that have educational programmes for older adults usually have a diverse range of courses and workshops, covering all areas of gerontological issues (bio-psycho-social) as well as digital literacy, cognitive stimulation, self-health care, physical and relaxation activities, artistic and literary activities, languages, economics, etc. In addition, the programmes have both paid and free initiatives, thus covering different areas of the public according to their socioeconomic status and previous studies. Administratively speaking, year by year the initiatives adapt the characteristics of their educational offerings through regular satisfaction surveys. These result in increased student loyalty and programme sustainability. The important contribution of these programmes, or educational initiatives, is that older adults not only acquire new knowledge and tools useful for life in maturity, but can also partake in a social space traditionally reserved for other age groups. New friendships are made and the programmes become support networks. It is also worth mentioning that some older adults have undertaken productive activities, given the exceptional foray of certain universities in training initiatives for seniors, which have resulted in tourism monitors and caregivers.

8.6 The Older Adult Programme at the Pontificia Universidad Católica de Chile

The Older Adult Programme at the Pontificia Universidad Católica de Chile began in 1988 with some initial courses and activities. In 1989, it was formally established by Rectorial Decree, by the Rector, Mr. Juan de Dios Vial. The programme was promoted and founded by Rosa Kornfeld, its first director, with the collaboration of a group of university professors and authorities, who were inspired by the French experience and searching for initiatives that would allow the university to be at the forefront of global education.

The Pontificia Universidad Católica de Chile's Older Adult Programme (*Programa Adulto Mayor* – PAM), in its two decades of existence, has sought to stay at the forefront of gerontology in Chile. It has also aimed to improve the quality of life of current and future generations of older adults by providing an educational environment where they can develop their potential and interests, helping them fully integrate into society. Another objective is to become a place where professionals working with older adults can study, stay up to date, and produce knowledge through research on the topic of ageing. PAM continually strives to be a platform through which the various academic units and areas of the university can come together to partake in interdisciplinary work. PAM is based on 4 main areas: development of an educational space for seniors; development of professional expertise; development and promotion of research on ageing issues; and dissemination of gerontological knowledge and work for society in general.

8.6.1 *Development of an Educational Space for Older Adults (Courses and Activities)*

Since its inception, PAM has taught in-classroom courses and workshops with professors from the university, and more than 34,000 students have participated. In the past 10 years, about 350 seniors participated each quarter, adding up to more than 1000 people each year. Participants generally take one or more courses each quarter and stay with the programme (taking courses) for 2–3 years.

The age range of the people attending PAM courses and workshops is 55–75, with an average age of 67, and the majority of attendees are women (70 %). A high percentage are retired professionals from many different areas of study, who are interested in continuing to learn and developing their areas of interest through in-classroom academic courses and workshops. They value the educational space as a place for regular interaction where new networks and social ties are cultivated. With respect to the courses, 80 % work on the quarter system, with three starts in the year (March, July, and October). They are taught in 10 sessions of 90 min, with a total of 15 h, and these sessions are held once a week. The workshops, on the other hand, are made up of smaller groups (20–25 people, depending on the subject), as they are intended to be more personalized. Every year an average of 15 in-classroom courses and workshops are offered each quarter. They are divided into the following areas:

- Spirituality and personal development: Courses related to the area of psychology and theology, among others, that offer tools for personal learning and personal well-being and foster positive ageing.
- Promotion of self-care and active ageing: The aim is for students to acquire practical tools to maintain healthy lifestyles and active ageing. Courses and workshops are offered on cognitive stimulation, memory, living longer and better, and nutrition and the Mediterranean diet, among others.
- Culture and knowledge: Through analysis and reflection on various historical, literary, philosophical, and artistic processes, these courses and workshops promote the study of art appreciation and understanding, history, philosophy, and appreciation and understanding of musical movements (opera, classical music, major composers), among others.
- Science and technology: The aim is to provide technological and scientific knowledge through courses in astronomy, physics, computer, Internet, etc.
- Artistic skills and expressions: These include a drama workshop, theater company, choral workshop, and autobiographical writing.

8.6.2 *Professional Specialization*

Certificate programmes and specialization courses for professionals and people who work with older adults and wish to specialize or stay up to date with current knowledge. In this time, more than 7000 students across the country have graduated

from the certificate programmes. It is important to mention that there is no undergraduate training in gerontology in Chile, as there is in other countries. In addition, in many degree programmes that tend to involve work with older adults, the curriculum often overlooks training in gerontology. This programme designs, develops, and implements these activities in an in-classroom format. Since they began, over 6000 students from across the country have completed the certificate programme and work in the areas of gerontological care and administration, psycho-gerontology, abuse prevention, social gerontology, and care for older persons.

8.6.3 Research

The programme, in fulfilling its mission of supporting teaching and research, has promoted a number of studies, based on a belief in the university's duty to contribute by generating new knowledge in the gerontological field and conducting applied research on the impact of educational programmes on the quality of life for senior adults. The most significant research is the Quality of Life in Ageing Survey (*Encuesta Calidad de Vida en la Vejez*) from 2007, 2010, and 2013, the only national survey that unveils the reality of older adults, their lifestyle, their concerns, their perceptions of their economic, family, social, and health situation, and the factors that allow them to feel more satisfied with life and enjoy an overall well-being.

8.6.4 Dissemination and Publications

The aim is to spread the work of gerontology throughout academia and society in general, in order to promote a gerontological culture among professionals and society and to help form a non-stereotypical view of ageing in the public opinion. Each year, PAM holds various conferences and seminars related to this topic, and produces publications for both mass use and restricted use, like the textbooks for the different courses and certificate programmes.

8.7 Discussions and Conclusions

While all the international agreements from assemblies on ageing incorporate education as a fundamental element in subjective well-being that improves quality of life in old age, educational initiatives that are capable of generating active citizenship among Chilean seniors are still waiting to be created. To do this, it will be fundamental to coordinate all the actors involved: the public-private sector, civil society, and the older adults themselves.

Educating senior adults is a key to societal development, mainly because it can be a direct and active way for seniors to participate, enabling social inclusion. Moreover, it creates a better connection with the social structure, giving visibility to the concrete contributions of older adults in the building of society through work, resource generation, caring for people, family ties, etc. Ideally, education should function as a tool for social inclusion, because with it we can reduce the sociocultural gaps whose negative effects are exacerbated in old age. In Chile, as in many other countries, one can see profound differences between those with higher levels of education and greater resources and those without them. Areas like education on health, literacy, active ageing, and participation and leadership, among others, have been where senior adult education has traditionally developed in the country, and although new areas have been emerging, the educational offering has been slow to diversify. This raises the question of how to better respond to the new needs and concerns of an increasingly growing and diverse group. Thus, the challenge is to design and offer new programmes that are based on the true interests of older persons.

Another major challenge is found in the professionals and specialists who work with seniors. In Chile, specialized training in gerontology and social gerontology is scarce, both in undergraduate study, where it is sometimes relegated to an elective course, and in postgraduate and graduate study, where very few universities have regular offerings. Given that university programmes for seniors in Chile represent less than 6 % (3 universities) and that initiatives aimed at this group are found in no more than 10 universities, or 20 % (of a total of about 50), and that other initiatives in foundations and municipalities (albeit with greater coverage) also fail to meet the needs of the senior population, it is clear that much work needs to be done with senior adult education in our country. Due to their social role, universities should continue to play a leading role in creating innovative programmes for seniors, actively thinking about old age and ageing in Chile and developing intervention methodologies to address new scenarios in the process of individual and social ageing in the country. This should help promote the expansion of this field to include the other social actors who have begun venturing into older adult education. To do this, more universities – and other academic institutions – need to commit to the issue, more public and private actors have to become involved in senior education, and there has to be a personal and social commitment towards ageing and seniors.

The country is ageing by leaps and bounds, and it is the mission of each and every Chilean to create the conditions for a better quality of life in old age. Progress has been made, but there is an urgent need to expand and diversify the educational opportunities for senior adults in Chile, as well as to prepare and educate the youth, given the new context that the country is experiencing. Today, adults over 60 years of age are very active and are projected to have over 20 years of family, work, and social life. The ageing process starts at birth and preparing for this stage is both a personal challenge and the challenge of society as a whole. Indeed, education is and will be key to overcoming this challenge.

References

- Biblioteca del Congreso Nacional. (1980). *Constitución Política de la República de Chile*. Santiago: Biblioteca del Congreso Nacional. http://www.camara.cl/camara/media/docs/constitucion_politica.pdf
- Biblioteca del Congreso Nacional. (2002). *Ley que crea el Servicio Nacional del Adulto Mayor*. Biblioteca del Congreso Nacional. <http://www.leychile.cl/Navegarid?idnorma=202950>. Accessed 24 Jan 2015.
- Biblioteca del Congreso Nacional. (2007). *Ley General de Educación*. Santiago: Biblioteca del Congreso Nacional. http://www.mineduc.cl/usuarios/convivencia_escolar/doc/201103050142570.Ley_N_20370_Ley_General_de_Educacion.pdf. Accessed 24 Jan 2015.
- Ilustre Municipalidad de Las Condes. (2013). *Cuenta gestión municipal 2012–2013*. http://www.lascondes.cl/resources/descargas/municipalidad/cuenta_publica/Cuenta_Publica_2012-2013.pdf. Accessed 24 Jan 2015.
- Ministerio de Desarrollo Social. (2011). *Encuesta Nacional de Caracterización Socioeconómica, CASEN*. Chile. http://observatorio.ministeriodesarrollosocial.gob.cl/casen/casen_obj.php. Accessed 24 Jan 2015.
- Servicio Nacional del Adulto Mayor (SENAMA). (2012). *Política integral del envejecimiento positivo 2012–2025*. Santiago: Servicio Nacional del Adulto Mayor. <http://www.senama.cl/filesapp/PIEP-2012-2025.pdf>. Accessed 24 Jan 2015
- Servicio Nacional del Adulto Mayor (SENAMA). (2013). *Cuadernillo temático N° 2. Fondo Nacional del Adulto Mayor: Iniciativas Autogestionadas por organizaciones de Mayores 2003–2013*. Santiago: Servicio Nacional del Adulto Mayor.
- United Nations. (1983). *Plan of action on ageing. Resource document*. United Nations <http://www.un.org/es/globalissues/ageing/docs/vipaa.pdf>. Accessed 22 Jan 2014.
- Villar, F., Pinazo, S., Triadó, C., Solé, C., Montoro-Rodríguez, J., & Celdrán, M. (2006). *Evaluación de programas universitarios para mayores: motivaciones, dificultades y contribuciones a la calidad de vida*. Instituto de Mayores y Servicios Sociales. Resource document Instituto de Mayores y Servicios Sociales, España (IMSERSO) http://www.imserso.es/InterPresent1/groups/imserso/documents/binario/idi66_06ubarcelona.pdf. Accessed 22 Jan 2014.

Chapter 9

Mainland China

Xinyi Zhao and Ernest Chui

9.1 Population Ageing in Mainland China

The trend of population ageing in China has been rather challenging as it stepped into an ageing society since 1999 (China National Committee Office on Ageing 2007). According to the most recent national census in 2010, in mainland China, the 60-and-above age group and 65-and-above age group amounted to 177,648,705 and 118,831,709, accounting for 13.26 % and 8.87 % respectively of the total population (National Bureau of Statistics of China 2011). It is projected that by 2050, the population aged 60-or-over and 65-or-over will constitute 32.8 % and 23.9 % respectively (United Nations 2013). Besides the huge size of the greying population, Chinese people's life expectancy at birth has also been increasing. The national census in 2010 revealed that the average life expectancy was 74.83 (72.38 for males and 77.37 for females respectively) (National Bureau of Statistics of China 2011). The United Nations has predicted that during 2050–2055, life expectancy at birth in China will grow to 80.5, with 79.3 years for males and 81.8 for females (United Nations 2013).

Many of the current cohort of older people had relatively low levels of education on average, probably due to the fact that some of them grew up during the wars (such as China's Resistance War Against Japanese Aggression from 1937 to 1945 and the Liberation War from 1945 to 1949) or in the period of the Cultural Revolution (1966–1976) when the opportunity to attend school was quite slim. The average

X. Zhao (✉)

Institute of Medical Humanities, Peking University, Beijing, China

e-mail: xinyi.zhao@hotmail.com

E. Chui

Department of Social Work and Social Administration, The University of Hong Kong, Hong Kong, China

e-mail: ernest@hku.hk

© Springer International Publishing Switzerland 2016

B. Findsen, M. Formosa (eds.), *International Perspectives on Older*

Adult Education, Lifelong Learning Book Series 22,

DOI 10.1007/978-3-319-24939-1_9

years of educational attainment of older adults aged 60 and above are 5.9 for males and 5.8 for females. About 51.4 % of the rural elders have no schooling and only 0.2 % of them have a college-and-above level of education, while the percentages for urban older adults are 16.4 % and 7.3 % respectively (Zhang and Guo 2009). However, benefitting from social and economic development in past decades, the education level of younger cohorts of older people has been improving.

9.2 Background to Older Adult Learning Development in Contemporary China

The development of elder learning in contemporary China has been influenced by various factors, including Chinese culture, socio-economic changes as well as the retirement system reforms.

Confucianism, which is the most influential value system in China, attaches importance to education and takes the standpoint that every citizen is educable (Lee 1996). Many classic sayings in China have vividly reflected people's respect for learning regardless of age. For instance, "one has to learn when one grows old" (a well-known Chinese proverb); and "there is no end to learning" stated by ancient philosopher Xun Zi (BC313-BC238). Although in ancient times the illiteracy rate was very high and learning in later-life was possible for a limited number of the elites, an emphasis on education has been rooted in Chinese people's minds.

In contemporary China, the dramatic socio-economic transformation has greatly accelerated the development of elder learning. First, economic development after the reform and opening-up since 1978 enabled the government to deploy more public resources for elder education. Second, older people have become better-off and begun to pursue a more enriched cultural life. Social development makes them more aware of the value of a positive lifestyle. Participating in learning might be a life choice for some seniors under the new social circumstances.

In addition, the reform of the retirement system for the cadres (namely, staff who take the leading/administrative role in government departments, state owned institutions or state owned enterprises) in 1982 has been considered as the direct driver of the development of elder learning (China Association of Universities for the Third Age 2010; Gao 2005; Yuan 2011). The reform abolished the lifelong tenure of cadres and set up a retirement age. At that time, retired cadres expressed their intent to be active after retirement and urged the government to initiate learning programmes. Also, the government thought organizing learning programmes would be an approach to stimulate the retirees' later life. Then universities for retired cadres came into operation in the 1980s.

9.3 The Government's Leading Role in Elder Learning Development

The government is the most significant sector in promoting elder learning. It takes the role in overall guidance and support. On the one hand, it lifts elder education onto the policy agenda. On the other hand, it provides funding, venues and facilities for elder learning. There are various laws that guarantee elder people's right to receive education in China. For instance, the *Constitution* emphasizes that "every citizen has the right to receive education". The *Law on Protection of Rights and Interests of Seniors* implemented in 1996 indicates that "older adults have the right to continue their education", and "the country should develop elder education, and encourage the nation to operate different kinds of schools for the seniors" (National People's Congress of China 2012).

Meanwhile, the State Council, the China National Ageing Committee (CNCA), the Ministry of Education, the Ministry of Civil Affairs, the Ministry of Culture, and other authorities have issued several policies and national plans containing content about elder education in the past decades. In 1999, to echo the International Year of Older Persons, the Ministry of Culture announced the *Recommendations on Strengthening the Work on Elders' Cultural Life*, which included measures on how to promote elder education. In 2000, the Central Committee of the Communist Party of China (CPC) and the State Council issued the *Decision on Strengthening the Work of Ageing*, calling local governments to pay attention to elder education. In 2001, the *Notice about Improving Elder Education* set up by the Organization Department of the CPC Central Committee and three other ministries, formally designated the Ministry of Culture to be fully responsible for non-credit elder education. The *Recommendations on Improving Grassroots Governments' Work on Elders' Issues* and the *White Paper on Tackling China's Ageing Issues* in 2006 also contained content about elder education. Then the *Recommendations on Further Strengthening the Development of Older Adults' Culture* issued by the CNCA in 2012 required the culture and education departments to incorporate elder education into the lifelong education and community education systems.

In terms of national plans, in 1994, 10 ministries of the central government jointly formulated the *Schema of the Development of Work on Ageing for Seven Years (1994–2000)*, which pointed out that "universities and schools for seniors are important forms of elder education" (China National Committee Office on Ageing 1994) and required municipal agencies on ageing to emphasize elder universities' development. The 10th, 11th, and 12th Five-Year Plan on China's Ageing Issues issued in 2001, 2006 and 2011 respectively, have all proposed goals and measures to improve elder education. Also, the 11th Five-Year Plan on Education Policy issued in 2007 identified the need to operate elder universities well and to expand their coverage. It was the first time that the central government incorporated education for the aged into the overall national education plan. Strategies and goals of elder education have been gradually upgraded along with social development. For example, the *Schema of the Development of Work on Ageing for Seven Years*

(1994–2000) in 1994 suggested offering interest and leisure classes to enrich older adults' spiritual and cultural lives (China National Committee Office on Ageing 1994). While more recently in 2012, the *Recommendations on Further Strengthening the Development of Older Adults' Culture* issued by the CNCA (China National Committee Office on Ageing 2012) encouraged innovations to teaching approaches and to curricula to improve seniors' social adaptability and quality of life.

The government has proposed several guiding principles for the growth of elder learning. The CNCA has proposed a six-phrase norm of “all elder adults are entitled (1) to be provided for, (2) to enjoy proper medical care, (3) to be given opportunities to pass on their experience, knowledge and wisdom, (4) to be given opportunities to learn, (5) to be given opportunities to do what they can to contribute to the society, and (6) to enjoy happiness in later life” as an essential guideline for the undertakings for older people. One of the well-known phrases – “all older adults are entitled to be given opportunities to learn” – can be considered as a guiding principle of promoting elder learning. Moreover, “lifelong learning” and “to build a learning society” could also be considered as key concepts in developing older adult learning. The former is a terminology originating from western society but it has similar meaning to a classical Chinese value, while the latter is a political goal in China. It has been listed as one of the strategic targets of constructing a well-off society at the 16th CPC National Congress in 2002. Also, as stressed by the CNCA in the *Recommendations on Further Strengthening the Development of Older Adults' Culture*, developing elder learning is an imperative to achieve lifelong learning and a learning society.

9.4 Modes of Elder Learning Programmes in Mainland China

At present elder learning in Mainland China could be categorised into five modes: (1) universities/schools for the third age, (2) community learning, (3) long-distance learning, (4) degree-education at formal colleges, and (5) other types. A brief introduction of each type is now provided.

9.4.1 Universities/Schools for the Third Age

At present, the University/School for the Third Age (U3As) are the most important and primary mode of elder learning in China (China Association of Universities for the Third Age 2010; Hong 2007). The difference between “university” and “school” mainly exists in scale: generally, those titled as “universities” are larger and are set up by the central, provincial, municipal or county governments or large corporations while the “schools” are usually in rural towns or urban communities on a

smaller scale. The majority of the universities/schools are established and financed by the government and some are founded by private sectors (Xiao 2000), charging a very low tuition fee ranging from tens to several hundred CNY for each semester.

The first U3A in China (Shandong Red Cross University for the Third Age) was established in Ji'nan City, Shandong Province in 1983 (China Association of Universities for the Third Age 2010). Since then, the model of the U3A has spread all over China (Lui et al. 2002). At the beginning, students in U3As were mainly retired cadres. But now U3As are open to all old/retired people on a first-come-first-served basis. In terms of gender, women are more active than men in U3A learning, their proportion being 65 % (China Association of Universities for the Third Age 2010). The year 2013 was the 30th anniversary of elder universities/schools in China. According to incomplete statistics, until 2013, the number of universities and schools for the aged has dramatically increased to 43,000 and learners have reached nearly five million (Gu 2013; Yuan 2013). The available data about the numbers of schools and students from 1983 to 2013 is shown in Table 9.1. U3As become increasingly popular among the seniors and the registration is very competitive. Older adults even have queued in the early morning to register for a course (Qingdao Morning Newspaper 2012).

The U3As operate education programmes under the overall guidance and support of relevant authorities such as the local old cadre bureaux, education bureaux, or cultural bureaux, varying from place to place, while U3As have the autonomy to operate education programmes that are not degree-based (Yuan 2011). There were only nine courses in 1983 when the first U3A was built; however, now universities and schools all over the country offer more than 200 kinds of courses (Lu 2008). In general, the majority of courses are related to life enrichment and promotion of good health

Table 9.1 Number of China's elder universities/schools and of students (1983–2013)

Year/month	No. of schools	No. of students
1983/09	1	586
1985/12	61	40,000
1988/12	916	124,800
1990/10	2091	218,400
1993/03	5331	471,000
1996/07	8378	695,900
1998/10	13,265	1,011,000
1999/12	16,676	1,413,000
2002/09	19,309	1,810,000
2004/03	25,060	2,313,600
2007/04	32,697	3,335,039
2008/12	40,161	4,302,365
2013	About 43,000	About 5 million

Source: Developed according to information supplied from the China Association of Universities for the Third Age (2010) and Gu (2013)

(Thompson 2002). The courses can be divided into eight categories: (1) news and laws; (2) literature and history; (3) language; (4) calligraphy and painting; (5) arts and sports (including singing, musical instruments, tai-chi, etc.); (6) health care (including Chinese medicine, massage, nutrition, etc.); (7) family financial management and household craft; (8) modern technology (such as computers and photography). Many U3As also classify a course into different levels of sub-classes, namely primary, intermediate and advanced. The courses usually open once a week, taking about 45 min to 2 h every time. The classes are delivered by full-time or part-time teachers. Most instructors have a senior or intermediate level professional title recognized by the government (China Association of Universities for the Third Age 2010).

The elder schools in rural areas are generally administered by a council formed by local government leaders. The rural elder schools do not have exclusive teaching venues. They usually utilize the space at township Party schools, or agricultural technology schools for classrooms. As older adults in rural areas still engage in agricultural work, rural elder schools mainly provide practical courses like breeding, farming technology, and health care, aiming to enhance older adults' technical competence in agrarian production. The instructors are technicians from veterinary or agricultural technology stations, and doctors from public health centres.

9.4.2 Community Education

Community education for the aged in China began at the 1990s (Ying Wang 2009). It includes community schools, activity centres, and spontaneous activity groups. The urban community schools for older adults are organized by the street office or a community residents' committee. A community elder school's operation is based on using existing resources in the community. For example, the classrooms become the community activity rooms. Specialists in art and health care are invited to give lectures or to guide art activities. Also, older residents form activity groups spontaneously (such as for dancing, singing, tai-chi). The instructors are talented older adults, and the time and venue are decided by group members in a highly flexible manner. However, the current situation of community learning is not very developed. The funds allocated to community education are not adequate; therefore, the facilities such as the venue and equipment cannot readily be improved, and human resources such as the instructors are not able to be attracted and retained.

9.4.3 Distance Learning (TV, Radio and e-Learning)

Recently modern technologies have been applied in elder education in China, including television, radio-broadcasting, and the internet. These facilities can offer easy access to those who are disabled or living in remote areas. In 2013, there have been about 2.2 million of older people participating in this form of learning (Gu 2013).

Shanghai is the first city in China that operates distance elder education. The “Shanghai Air U3A” started broadcasting on Shanghai Education Television Station in October 1995. It delivers courses through TV. At present, there are about 260,000 older citizens in Shanghai watching the “Shanghai Air U3A”. Beijing City, Zhejiang Province and other places have also started long-distance elder education consecutively. Some U3As also provide health-related courses through radio. The participants of radio education largely reside in towns and rural villages (China Association of Universities for the Third Age 2010). E-learning is a new learning approach arising in late 1990s. In October 1999, “The Shanghai Online University for the Elders” was co-founded by Shanghai University for Elders, the Shanghai Municipal Committee on Ageing, and the Shanghai TV University. Subsequently, U3As in other cities also launched online universities. U3As upload instructional videos and lecture texts to the network for older learners.

9.4.4 Formal Diploma Education

Formal higher education in China has been opened to older people since 2001, when the Ministry of Education announced a new initiative to reform the university enrolment system. It cancelled the restriction on age and marital status (namely, 25 and younger, and unmarried) for taking the university entrance examination, which has paved the way for lifelong learning. Since then if older people pass the examination, they can learn in formal tertiary education institutions as the youth do. Every year at the period of the entrance examination, there are news reports about some older adults who have taken the examination several times to fulfil their dreams of a university education. Due to the paucity of cases, little research has been conducted on this group. Nonetheless, it would be a potential and worthwhile area for research on how to enlarge the access of tertiary education for seniors, and how to make use of higher education resources for elder education.

9.5 Key Issues in Sustaining Older Adult Education

Although elder education in China has developed substantially in the past 30 years, there are still some issues and problems to resolve if we want to further improve elder learning in such a huge country. At present, an older person’s right to learning has been ensured by laws. However, unlike some developed nations such as the USA and Japan, China has not passed a specific law concerning elders’ rights to education. The existing relevant policies mainly focus on stressing its importance and proposing developmental goals. The content is often abstract, lacking specific provision for practical operation in different education programmes.

The central government formally appointed the Ministry of Culture to supervise elder education in 2001. But subsequently in local practices, collaborative

departments that supervise elder education include education bureaux, cultural bureaux, civil affairs bureaux, or retired cadres bureaux. The unclear and multi-sectorial administration system can easily lead to overlapping management and the shirking of responsibility (Zhou 2004). Also, it may cause difficulty in the integrated utilization of educational resources and in influencing further development.

Moreover, government's financial support for elder learning is limited. Scholars have noted the expenditure on elder education has not been included in the government's budget yet (Shen 1999). Because of limited resources, some educational agencies cannot expand enrolment to meet the increasing demand. The reasons for insufficient funds might be that first, the government had given primary concern to economic development and less attention to elder services before the 2000s when population ageing was not so serious. Second, the government's endeavour had been devoted mainly to consolidating the old-age pension and medical insurance for older adults. However, according to Maslow's theory of motivation (1970), it could be argued that after basic demand is satisfied, higher level demands such as that of later-life learning would emerge as important. Thus, the government may allocate more resources to meet elders' learning demands in the future.

Although the number of participants in elder learning has been increasing over the years, the coverage is still small due to the large scale of the older population in China. Even for the major learning mode, U3A, the participation rate is still less than 2 % (Hong 2007). Besides a low participation rate, another problem is the unbalanced distribution of elder learning resources between developed and underdeveloped regions. In capital cities or cities with sound economic conditions, there has been a relatively effective elder education system established for older adults, including U3As, community learning centres, TV and online U3As, as well as other kinds of non-formal learning resources (such as public libraries and museums). However, older adults in the less developed regions cannot grasp as many learning opportunities as those in developed areas.

9.6 The Future of Older People's Learning

It is expected that at a macro level, the administration system of elder learning will be reformed, and the responsibilities of relevant departments will be defined more clearly. Also, the government should become more aware of the significance of elder learning and allocate more resources to it. In addition, the government's contemporary promotion of urbanization and "unity of city and countryside" should bring benefits for elder education in rural areas.

Since the community is the major place where most older people live, community learning would be the most convenient approach for elder learners. However, its development requires the government to invest more funding and human capital, and requires integration of education resources and collaboration between local communities, formal educational institutions, and NGOs. Further, e-learning should emerge as a popular mode in the future. With the pervasiveness of information technology, the internet may eventually become an essential medium through which

people acquire information. According to *The 31st China Internet Network Development Statistic Report* (China Internet Network Information Centre 2013), citizens aged between 50 and 59 and aged 60 plus reach 24 million and 10 million respectively, covering 4.4 % and 1.8 % of total citizens. In anticipation of the improved education level of the future cohort of older people, many of them will be able to master basic computer operational skills. Thus, e-learning will experience substantial development in the future.

The content and modes of elder education need innovation to keep up with the times and meet elders' needs. The education level of Chinese people has increased according to the sixth national census (National Bureau of Statistics of China 2011). As previous education attainment is a major predictor of whether an individual is likely to join in adult education (Swindell 2000), the future cohort of Chinese is expected to have higher expectations for education than the current cohort. As stated previously, males' lower participation in U3As and community learning is likely to be attributable to the fact that the courses are more attractive to women. Thus, in the future some new courses might usefully be developed to accommodate older males' learning interests and characteristics. Moreover, it is suggested to develop classes about retirement adaptation and psychological health in community education settings. Furthermore, it is possible that the learning mode of "elderhostel" (a travel and learn programme), which has been popular in western countries, may become popular in the future. This is because senior citizens' financial conditions are improving and more of them can afford to travel within China, even overseas. Elderhostel should prove to be a sound approach for them to learn through travelling.

It is necessary to mention that a large part of the future cohort of older adults will be the parents of an only child, as China's One Child Policy was initially implemented in 1979. The traditional family structure, an extended family, has been gradually replaced by the nuclear family. Based on the fifth national census, it has been identified that the nuclear family structure accounts for as much 68.15 % among all family structures in contemporary China (Wang 2006). If the only-children work in different regions from their parents, a greater number of empty-nested elder households will form and the time that older adults spend with the next generations will probably decrease. In this sense, engaging in learning activities would be a sound choice for them to enrich their later life. Therefore, elder education in the future should take such a social context into account, and planners provide courses that help seniors to adapt to role transitions so that they can enjoy themselves, even if the family structure becomes smaller.

9.7 An Initiative in Elder Learning in China: The U3As' "Second Classroom"

In addition to conventional lecturing in classrooms, some U3As run the *second classroom* for students, aiming to encourage older people to apply their knowledge, to better integrate into society and serve the community. The second classroom

entails extra-curricular societies such as art troupes, painting/photography associations and volunteer teams organized by U3As. Through these programmes, older adults who are learning dance/singing/musical instruments can have the opportunity of performing in the community and even joining in talent shows. Participants who like drawing or photography are organized to engage in outdoor sketching and supported in holding exhibitions. Teachers and students in urban U3As are organized to be involved in voluntary activities such as “delivering art and education to the countryside”. They bring art performances and advanced teaching methods to elder education in rural areas. A commendable activity involves volunteers visiting the poor or widowed elders. The second classroom has enhanced elder students’ learning enthusiasm by providing chances for them to practise varied tasks. Meanwhile, older adults’ self-efficacy and self-esteem have been improved through making use of what they have learnt to contribute to society.

References

- China Association of Universities for the Third Age (Ed.). (2010). *Zhongguo chengshi laonian jiaoyu yanjiu* [Research on the elderly education in urban China]. Beijing: Higher Education Press.
- China Internet Network Information Center. (2013). *The 31st China internet network development statistic report*. Retrieved August 30, 2013, from http://www.cnnic.net.cn/hlwfzyj/hlwzxbg/hlwjtjbg/201301/t20130115_38508.htm
- China National Committee Office on Ageing. (2007). *Forecasting research on the trend of ageing in China*. Beijing: China National Committee on Ageing.
- China National Committee Office on Ageing. (2012). *Recommendations on further strengthening the development of older adults’ culture*, China.
- China National Committee Office on Ageing, Ministry of Civil Affairs, National Family Planning Commission, Ministry of Labour, Ministry of Personnel, Ministry of Health, National Education Commission, Ministry of Finance, All-China Federation of Trade Union and All-China Women’s Federation. (1994). *Schema of the development of work on ageing for seven years (1994–2000)*, China.
- Gao, L. (2005). *Beijingshi laonian daxue fazhan xianzhuang yu duice yanjiu* [Study on the development actuality and solution for the University of Third Age in Beijing]. Thesis for Master’s degree, China Agricultural University, Beijing.
- Gu, X. (2013). *Zai guoji laonian daxue xiehui lishihui ji quanti huiyi shang de zhici* [Opening address on the plenary meeting of International Association of Universities of Third Age]. *Laonian jiaoyu (Laonian daxue)* [Education Journal for Senior Citizens] (6), 8–9.
- Hong, N. (2007). *Qianxi woguo laonian jiaoyu shiye de fazhan* [A brief introduction of the development of elder learning in China]. *Journal of Guangxi University for Nationalities* (Philosophy and Social Science Edition) (S2), 20–21.
- Lee, W.-O. (1996). The cultural context for Chinese learners: Conceptions of learning in the Confucian tradition. In D. Watkins & J. B. Biggs (Eds.), *The Chinese learner: Cultural, psychological and contextual influences* (pp. 25–42). Hong Kong: Comparative Education Research Centre.
- Lu, J. (2008). *Zhongguo laonian jiaoyu 25 nian lilun yanjiu gongzuo de shuli* [The summary of the theoretical research on elder education in China in the past 25 years]. *Laonian jiaoyu (Laonian daxue)* [Education Journal for Senior Citizens] (12), 15–22.

- Lui, Y. H., Leung, A., & Jegede, O. J. (2002). *Research report on overseas experience in providing continuing education for older persons*. Hong Kong Open University of Hong Kong.
- Maslow, A. H. (1970). *Motivation and personality* (2nd ed.). New York: Harper Row.
- National Bureau of Statistics of China. (2011). *2010 nian diliuci quanguo enkou pucha zhuyao shuju gongbao* [Communique of the main data from China's sixth national census in 2010]. from http://www.stats.gov.cn/tjfx/jdfx/t20110428_402722253.htm
- National People's Congress of China. (2012). *Law on protection of rights and interests of seniors (Amendments)*, China.
- Qingdao Morning Newspaper. (2012). *Shang laonian daxue redu kan be gaokao* [U3A registration is as hot as the college entrance exam]. Retrieved June 10, 2013, from http://edu.qingdaonews.com/content/2012-10/23/content_9457924.htm
- Shen, H. (1999). Laonian jiaoyu: Shijiexing de gongtong keti [Elder education: A common issue worldwide]. *Educational Science Research* (2), 40–46.
- Swindell, R. (2000). A U3A without walls: Using the internet to reach out to isolated older people. *Education and Ageing*, 15(2), 251–263.
- Thompson, J. (2002). *The amazing University of the Third Age in China today*. Retrieved July 1, 2012, from <http://worldu3a.org/resources/u3a-china.htm>
- United Nations. (2013). *World population prospects: The 2012 revision*, from http://esa.un.org/unpd/wpp/unpp/panel_population.htm
- Wang, Y. (2006). Dangdai zhongguo jiating jiegou biandong fenxi [The changing family structure in contemporary China: An analysis]. *Social Sciences in China* (1), 96–108.
- Wang, Y. (2009). Zhongwai laonian jiaoyu bijiao [Comparison of elder education in China and abroad]. *Xueshu luntan* [Academic Forum] (01), 201–205.
- Xiao, C. (2000). *China: Lifelong learning and the use of new technology*. Retrieved March 4, 2010, from http://www.techknowlogia.org/TKL_Articles/PDF/171.pdf
- Yuan, X. (2011). Guanyu fazhan laonian jiaoyu shiye de jige wenti [Some issues about the development of older adult education]. In J. Sun (Ed.), *Zhongguo laonian jiaoyu: Tansuo yu shijian* [Education for the elderly in China: Research and practice] (pp. 3–9). Beijing: Science Press.
- Yuan, L. (2013). Laonian jiaoyu de chuangxin yu fazhan: zai guoji laonian daxue xiehui lishihui ji quanti huiyi shang de jianghua [Innovation and development of elder education: Speech on the plenary meeting of the International Association of Universities for the Third Age]. *Laonian jiaoyu (Laonian daxue)* [Education Journal for Senior Citizens] (6), 11–12.
- Zhang, K., & Guo, P. (2009). *Zhong guo ren kou lao ling hua he lao nian ren zhuang kuang lan pi shu* [The blue book of China's population ageing and the current status of the elderly]. Beijing: China Social Science Press.
- Zhou, L. (2004). *Chenshi shequ laonian jiaoyu xianzhuang yu duice yanjiu* [Research on elder education in urban community]. Thesis for Master's Degree, Minzu University of China, Beijing.

Chapter 10

Colombia

Miguel Alberto González González

10.1 Colombia Today

When we talk about Colombia, we really think of many ‘Colombias’. Colombia is a country with 47 million inhabitants where an amazing ethnic multiplicity such as afro-Colombians, indigenous, Caribbean, mestizos, mulattos and white people are distributed throughout the length and breadth of its geography. Within that diversity, some groups live in extreme poverty such as indigenous and Afro-Colombians, that is, they have been excluded both by the government and (higher) education institutions. These people have been excluded because of their race/ethnicity, economic conditions, and geographical location; their poverty has forced them to live in inhospitable areas and, for sure, older people are the most marginalized ones in the country.

The reality for older people is that while the nation is socially indebted to them, many have been segregated into the lowest stratum of this society. Colombia’s National Planning Department policy has classified its society through social strata as a way to build political proposals and to make decisions to confront poverty. The categorization includes the following divisions: stratum 1: lower; stratum 2: low; stratum 3: middle-low; stratum 4: middle; stratum 5: medium-high; stratum 6: high. Although these strata are presented as a mechanism to differentiate what people pay for utilities, they also work as a mechanism for discrimination and social division. Furthermore, and according to these strata, utilities and health care fees vary depend-

M.A.G. González (✉)
Universidad de Manizales, Manizales, Colombia
e-mail: miguelg@umanizales.edu.co

Table 10.1 National population projections 2005–2020

Distribution by age from 60 years	2013			2020		
	Total	Men	Women	Total	Men	Women
Colombia						
Total population	47.121.089	23.264.039	23.857.050	50.911.747	25.138.964	25.772.783
60–64	1.594.650	753.793	840.857	2.112.198	982.386	1.129.812
65–69	1.194.296	558.729	635.567	1.604.139	737.936	866.203
70–74	865.218	394.140	471.078	1.160.128	521.566	638.562
75–79	660.523	287.769	372.754	763.428	330.117	433.311
80 Y MÁS	650.106	270.754	379.352	800.885	321.369	479.516

Source: National Department of Statistics (2013)

Table 10.2 Gross domestic product in Colombia

Year 2000	2011	2012
US\$2.385	US\$7.325	US\$8.089

Source: National Industry Association (2012)

ing in which of these strata a person belongs to. If someone belongs to a stratum 1, life conditions are difficult and considered terrible, as education, health and other social institutions have poor facilities. For example, regarding the public education system, teachers working in such locations are not the best-trained ones. Likewise, health, recreation and any other state or private programmes are organized similarly. In comparison, the dynamic of the higher stratum is very different; here the professional training for social workers is much better. Hence, to be an older person in stratum 1 or 2 is almost like being doomed to oblivion by both the society and the state's agenda; being old is barely noted; in this stratum many older people are poor.

The estimate of the Colombian older people population (aged between 60 and 80 years and over) is around six million in an overall population of 47 million. Colombia's National Planning Department, the institution in charge of the population census, including growth rates, unemployment figures and migration patterns seldom delivers on effective planning policies for the country. The statistics in Table 10.1 point to expected significant growth in the numbers of older people from 2013 to 2020.

Monsalve (2010: 31) comments that:

The annual increase in people over 60 years in Colombia is 80,000. In 2025, the annual increase will be 4 times higher and in 2050 will surpass those under 15 years by about one million people. The percentage of the elderly in rural areas is 33.7 % and 61 % of the total live in indigence.

This picture confirms not only the growth in numbers of older people but it also identifies their poverty rate. These are factors that the country will face as it deals with the provision of both health and education. The poverty level has reached worrisome levels as recognized by the Colombian Republic Bank. In the same sense, the GDP (Gross Domestic Product) has moved as follows (Table 10.2).

In contrast with first world countries the difference is appalling. Norway reported U.S. \$ 99,558 (World Bank 2013) or approximately \$92,000 difference, which emphasizes that older adults in Colombia are severely disadvantaged compared to those from developed countries.

10.2 The Past and Its Impact on Learning for Colombia's Older People

Colombia has recently celebrated two centuries of independence. Thus, it is a young country, that has not taken good care of older people, and has arguably, forgotten them. This is a country whose legacy comes from Spanish settlers, who have been deaf to opposing voices, as exposed by González (2010: 73):

There is an endemic deafness, deaf of complaints about corruption and criminal acts made by the government. Colombia is a deaf country to hear about violence, it does not want to hear the old people claiming for better public services, and better attention which they believe they deserve.

Therefore, Colombia is deaf to hearing about the problems of poor older people. From a literary perspective, what old people represent to the Country is captured in the words of the Colombian writer in his novel, *No One Writes to the Colonel*. Garcia (1989: 16),

The colonel read, as always, from the first page to the last one, and even the advertisements. But this time he did not get concentrated. And as he was reading, he thought about his veteran's pension. Nineteen years ago, when the Congress enacted the law, a process of justification began, and which lasted eight years. Six years later, it was needed for him to be included in the roster. That was the last letter the Colonel received.

As we see, elders are not only a matter of research programmes, but a subject for novels and other types of book.

10.3 Current Education for Older People in Colombia

As for adult education, there have been efforts in the past 50 years in preventive health campaigns and around literacy to address issues facing older people. Nevertheless, there are nursery homes for people *in the fourth age* that are only providing food, clothes, medicine, and entertainment activities, but nothing on education programmes. Sometimes, there are paintings and dancing courses, guided reading, and teaching them how to make crafts as a way to spend leisure time, but these are not really intended to integrate them into wider social life.

Illiteracy has reached the level of 6.63 % in the entire Colombian population, and “Official statistics show that from nearly 1.2 million illiterates in Colombia, there are 624,000 men and 551,000 women” (Ministry of Education 2013). In fact, the

largest illiteracy number is shown amid older adults, where about 70 % are concentrated in rural areas. Women are more badly treated than men, as they have been segregated and excluded from many education programmes. Although in the past 50 years the gender realities have become more equalized, it was very traditional in Colombian families that women should be at home to look after children and meet the demands of the husband, and consequently, should not study, just learn to cook, fix clothes and keep the house clean. In fact, there are still professions where Colombian women do not have access or if they have it, it is at very low levels as in military training or mining, to name a couple. For older women from lower social classes, education was limited to work at home. For example, there are currently no programmes for these types of women who remain segregated, even for basic training needs. This shows the persistence of sexist influences in Colombian society, derived mainly from colonial history.

It should be taken into account that an older adult in Colombia is defined as someone being over 60 years old and/or those people whose health conditions require special attention. This approach is supported by the Law 1276 (2009) which specifies in its article 7. B “Elderly. A person who is 60 years old or older. An exception to be included within this range are people less than 60 years when their physical and psychological conditions so determine”. While this is stated in law, reality functions in different ways. Just by taking a close look at the elder shelters in Colombia, there is a crisis evident for very old and disabled people; there are not enough social programmes to support their demands such as in education and health.

State programmes through the Family Welfare Fund (e.g. Cafam, Comfamilares) and its municipal subsidiaries are just focusing on taking care of old people in the narrow aspects regarding physical and psychological situations, but almost nothing concerning (higher) education.

Given that this fund is one of the country’s most important, it is incomprehensible that it does not have serious programmes focused on older people’s education. Additionally, the outcomes have been very disappointing. For instance, the courses offered by Comfamilares, the so-called *Cajas del Conocimiento* (boxes of knowledge) for seniors, are just instructions for courses related to systems and PC foundations, basic web surfing, and special culinary arts. Meanwhile, CONFAMA, one of the largest institutes of family welfare in the country, has no educational offerings for older people. Meanwhile, in one of their School training programmes, a human development and family purpose is deployed. It is said: “Our institute contributes to older adults’ quality of life by conducting relevant programs”, that is, they want to educate people who work with older adults, but do not offer academic options for them. One of the most complex cases is embodied in CAFAM. (Institute of Familiar Compensation). Despite the fact of its being one of the largest family-institutes in the country, having its own university, it does not offer any adult education programmes. This institute founded a university with economic sources from pensions and workers’ contributions, yet, so far, it has not created an adult education department or faculty.

The above observation allows us to consider what Calasanti pondered (2003: 205) “Discrimination and exclusion based on age – across lines of race, class, and gender – does it exist?” No doubt the answer in the case of Colombia is that there is such discrimination and worse than that, a huge state negligence. In addition, looking at Colombian universities, the response to this supposition is similar, as these institutions do not offer any education programmes for mature-aged adults.

10.4 The Role of Universities and Other Agencies

Colombian universities have a large debt to older people yet it is almost impossible to find programmes for this sub-population. The Universidad del Rosario promotes social action for adults through literacy workshops, encouraging them to become educated and productive citizens. However, this opportunity has been offered as an extension program, and not as a mainstream programme of the institution. Despite the fact that there is a university considered of high status in the country (Universidad Nacional), it is unconceivable that there is not at least one programme targeted to older students.

The SENA (National Apprenticeship Service), the country’s largest institution responsible for the technical and technological training of the Colombian population (who mainly belong to economic strata 1–3), has more than 500 training offerings. However, it acts similarly to the university system, not having any offerings for older people, and older people are almost invisible to them. *Colombia Aprende* which is a private institution, currently provides online and classroom courses for preschool, elementary, secondary, and higher education; it has also a section called Educación para adultos (Adult Education) which offers various training courses, but focuses its interest in literacy:

Literacy processes, as understood today, go beyond the acquisition of literacy skills and extend to the ability for interpreting the world and life itself, as well as the development of basic skills with an effective purpose in daily life. (Colombia Aprende 2013: 32)

What is more, its target population is rural and those in urban areas with high levels of poverty. It is only focused on literacy, that is, how to read and write, but nothing else regarding courses for older people who really need to enhance their skills. Across the world, including Latin America, there are universities which have undergraduate and graduate programmes that include Adult Education. Perhaps surprisingly, in Colombia there was no university interested in adult education until 2014. At times there have been some university invitations to train older people, but these have been restricted to reducing illiteracy statistics. After the period of neglect by Colombian universities towards older learners, the market is “taking care of them” as a target for new products; the markets need seniors to increase sales. Jones et al. (2008: 97) have observed: “Although studies clearly

demonstrate that it is the consumption of the products of mass culture and the exposure to mass media what distinguishes the most in the identities and life-styles of the contemporary old people". In short, the purchasing power of adults is wanted as an economic option; further, there are cultural and recreational activities and other products where older people can be exploited. From a market logic, it is probable that education for "golden agers" should become profitable; at this realization, Colombian universities may turn to implement educational programmes for them.

In the non-formal learning/education area, it is possible to find more activities, more options for older persons, but all of these institutions are private. In such places it is possible find programmes like dance, painting, manual arts, guitar and aerobics. In fact, in the main Colombian cities, there is a visible increase in this type of non-formal training institution engaged in various recreational activities of life for older adults. Some of these entities design programmes for entrepreneurship and solidarity with groups of seniors.

10.5 The Future of Adult Education for Older Colombian People

Are there any other options for Colombian older adults at universities or other education institutes? At present, older people's educational future is not written or formalized, and although there are some intentions, there is just a sad current reality of insufficient endeavour. In 2013 the government has opened a call to benefit older adults, while not directly addressing education for them. The National Government's interest is to support nonprofit institutions, from public, private or mixed, catering to this kind of population belonging to the population in extreme poverty (Ministry of Education 2013). The Colombian Government has the idea of financially supporting institutions that have programmes accommodating older persons; yet there is little commitment for the generation of university programmes for mature people. There is also a very important programme called *Cero Analfabetismo* which has an investment of U.S. \$32.000.000.00 to be used to reduce illiteracy to 5.7 % between 2012 and 2014 in the Colombian population (Universia Colombia 2011). This action may encourage us to think that Colombia is taking more care of its adults. As part of this future, Minguez (2009: 131) proposes that "The binomial of citizenship education, society and the political will enable articulation of new times". As a consequence, it is necessary to strengthen Colombia's educational system to take such a vision seriously, and to build a real connection between education institutions and adult education to facilitate new options for this forgotten population. In this new impetus, there is need for a strong link between university and older people to be established.

10.6 A Case Study: Life Testimonies for the Past, Present and Future of Colombian Third Agers in Terms of Higher Education

The following interviews with older adults were conducted in major cities around the Eje Cafetero y Norte del Valle; dialogues took place between 2013 and 2014, initiated by Miguel González. The research questions were: Have you ever studied at a university? Would you like to attend to a training course at any university? How does it feel to be an older person in Colombia? From these voices emerge unpleasant experiences in terms of accessibility and relevance of university education for older adults. From the life stories, we hear at first hand the issues faced by older people and their aspirations for a university education. Ana, who is a 65 year old woman and sells lottery in Pereira, says

I've never studied, and I was taught to read by my boyfriend. In Colombia people don't want or like old people, and the government doesn't care about poor old people's education.

This quote shows the older adults' Colombian realities, which is that not only did most of them not go to university, but also there are not any academic programmes for them. Yet, her aspirations were to engage with the academy. Manuel, a 73 year old man who works as a fruit vendor in Armenia, says,

My parents allowed me to study, but I did not like it. At this age, going to university is stupid. What I needed is to be healthy and have money to buy groceries. For sure, nobody likes old people, and it is the same in Colombia, the USA and in Patagonia.

For Manuel, the issue happens everywhere; he assumes that adults are not interesting people for governments and for citizens, and insists that going to university is stupid because the main thing in life is to survive. Carmen is a 70 year old woman. She is a housewife in Armenia, indicating,

No, I did not go to college; I never feel attraction to be a scientist. Look, now if I go to a university it is wasting time. The reality is simple, Colombian government does not care for old people.

This answer confirms other views from some Colombian adults, in that the important thing for them is how to survive, and as she insists, "Government is not interested in adults". She does not see any need in going to study; and this is a big question for Colombian society: why is it that adults consider going to university a stupid thing? Ramon, a 77 year old man, retired from Manizales, says

Impossible for me, I was always taking care of farms until I got retired. Being an old person in Colombia is crap; we're useless to everybody, and the government plays the fool with us. On top of that when we get retired, the older one gets, the less important you are.

As expressed by Finsden and Formosa (2011: 14) "The association between retirement and loss of status, role, and self-identity is also problematic". In the case of Colombia it is much more serious to be old because no training institutions or

universities are interested in older adults. It is as if the main motto for universities is to forget older adults. Pedro, a man aged 66, a fruit seller at Pereira traffic lights, says

Man, it was impossible for me to think about college, if I studied there was no food for my family. I really like to go to college someday. Politicians are dupes, and Colombia is not interested in older adults, we've been forgotten, we are a dilemma, we're not-valued.

This is another case where Pedro had to work first and then think about studying. In addition, as for many other Colombian adults, he was unable to go to school. He insists that he would like to go to study, and that politicians are the biggest problem for him. No doubt, he reminds us that Colombia does not like older people, they have been forgotten and seem worth so little, and as they are often abandoned and commonly poor. Miriam, a 69 years old wife, wholesaler in Cartago, North of Valle del Cauca, remarks:

Impossible, my dad would've never let me go to college, but if I'd have liked though. I love the idea that third aged people, as you say, want to study to be filled with other knowledge in college. In Colombia old people are a problem; hospitals do not serve us as we deserve.

Statements such as this illustrate where women have been suffering from discrimination. On the other hand, it is also evident, that she likes to go to college, but points out that older people are not recognized in Colombia. There is no policy, as in other countries, in which the costs of public services are reduced. Finally, she states that Colombia considers older adults as lower rank subjects. John, an 80 year old man, Cartago, North of Valle del Cauca, explains

When I was born it was unthinkable to go to college. I would go to college and learn how these scientists are so smart. Colombia's government does not want the older adults.

A number of complaints is repeated in these interviews, such as being poor, having no pension, not having access to university due to the need to work; nevertheless, there is a profound desire that they want to know the academic world even though it has blatantly ignored them. Older adults interviewed did not lament being old nor fear death. This notion is reinforced by the renowned writer and neurologist, Oliver Sacks, who commented "Being 80 years, with a handful of medical and surgical problems, although none of them would weaken me. I feel glad to be alive: I'm glad that I did not die!" While the Colombian government neglects older people, the older people themselves nevertheless agree that life is worth living. What then is the role of Colombian universities?

10.7 Discussion and Conclusion: Dilemmas of Being an Older Person in Colombia

Older people in social strata one and two are largely invisible in this country. The university and education institutions are not interested in thinking about or providing for older adults. What languages of power have made us forget old people?

Perhaps, the economy and cavern trade may provide some clues. The dilemmas of being an older and poor person in Colombia have been exposed, where abandonment, neglect and hatred seem to accompany this social group. There are very few opportunities for 'third agers' to continue their studies or, as for many of them, there is a real hopelessness (Freire 1993). Higher education has systematically ignored old people, since no training courses or programmes for this population are offered though a few might eventuate as a result of financial exploitation. More positive laws are required to render older people as honourable and truly visible.

When both a country and its institutions have forgotten their older people and have focussed everything on youth, we may state it is an ungrateful nation, a nation without memory and likely to keep repeating its history; of not wanting to know or being interested in older people. It is also as sad as dramatic to be an old person in Colombia. Findsen and Formosa (2011: 9) state that "apart from being a demographic phenomenon, human ageing also constitutes an ongoing biological, psychological, and social process that is embedded within the dialectical relationship between individual agency and the societal structure". In this case, individual agency has been subservient to societal structure. What can be done about this situation? There is an urgent need to modify pension bonds to include older adults, who have previously been left out of access to pensions. It is recommended to create an institution similar to SENA, but targeted to emphasize an older population education. Returning to the voices of Miriam and Minguez, it is urgent for third aged Colombians not to be treated as third category people. Given the commonality of humans to encounter political, loving, emotional, sexual, technological, cultural and relational issues, there are considerable opportunities for universities in Colombia to engage with older people. In particular, suitable outreach programmes from universities to older citizens can ease the current gap between universities and seniors. In the process, Colombia as a young country, may get to know its elders.

Colombian older people need real programmes, real attention from the government and a massive effort from the education system to include them in programmes, to open the doors and be more helpful to our old people, for eventually we will all be old. It is also sad to acknowledge that at present Colombian universities are not acknowledging poor people, and worse than that, poor older adults. Great Colombian literature has told us about the dangers of abandonment of older adults, the forgotten, and their dilemmas have been mentioned in many books. Estanislao Zuleta, William Ospina, Porfirio Barbajacob, Eustasio Rivera, Alvaro Mutis have explicitly written clear accounts of what we have not been able to do or be with older people, about our way of being Colombians. Faciolince, for instance, warns by saying, (2007: 257) "We live in a country that forgets its best faces, its best impulses... because we are a calm land for the neglect of what we love the most". We need to confront and address the dilemmas of our seniors, and become a generation that will provide a second opportunity on earth.

References

- Andi (National Industry Association). (2012). *Balance report 2012 and outlook 2013*. <http://www.larepublica.co/sites/default/files/larepublica/andi.pdf>. Accessed 21 Aug 2013.
- Cafam. (2013). *Family compensation fund*. <http://www.cafam.com.co>. Accessed 10 Aug 2013.
- Calasanti, T. (2003). Theorising age relations. In S. Biggs, A. Lowenstein, & J. Hendricks (Eds.), *The need for theory: Critical approaches to social gerontology* (pp. 199–218). Amityville: Baywood.
- Colombia Aprende. (2013). <http://www.colombiaaprende.edu.co/html/home/1592/article-228165.html>. Accessed 10 Aug 2013.
- Comfama. (2013). *Family compensation fund*. Colombia; Comfama. <http://www.comfama.com/webinicio/default.asp>. Accessed 10 Aug 2013.
- Confamiliares. (2013). *Family compensation fund of Caldas*. http://www.confamiliares.com/familias/familias_ppal.html. Accessed 31 Aug 2013.
- Faciolince, H. (2007). *El olvido que seremos*. Bogotá: Editorial Planeta.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life*. Rotterdam: Sense Publishers.
- Freire, P. (1993). *Pedagogy of the oppressed*. New York: The Continuum Publishing Co.
- García, M. G. (1989). *No ones writes to the Colonel. El coronel no tiene quien le escriba*. Bogotá: Editorial Oveja Negra.
- González, G. M. A. (2010). *Umbrales de Indolencia. Educación sombría y justicia indiferente*. Manizales: Universidad de Manizales.
- Jones, I. A., Hyde, M., Victor, C. R., Wiggins, R. D., & Higgs, P. (2008). *Ageing in a consumer society: From passive to active consumption in Britain*. Bristol: Bristol University Press.
- Labour Ministry in Colombia. (2013). *Gobierno abre convocatoria para beneficiar a adultos mayores del programa Colombia Mayor*. <http://www.mintrabajo.gov.co/mayo-2013/1855-gobierno-abre-convocatoria-para-beneficiar-a-adultos-mayores-del-programa-colombia-mayor.html>. Accessed 7 July 2013.
- Law 1276 of 2009 Colombia. (2009). *New approaches to integrated care for older persons in the life centers are established*. Ley 1276 de 2009 Colombia. http://www.secretariassenado.gov.co/senado/basedoc/ley/2009/ley_1276_2009.html. Accessed 20 July 2013.
- Minguez, G. J. (2009). Opening new educational fields. Towards education in older people. *Rheta*, 12, 129–151.
- Ministry of Education of Colombia. (2013). *The way to reduce the rate of illiteracy*. <http://www.mineducacion.gov.co/observatorio/1722/article-288766.html>. Accessed 12 Oct 2013.
- Monsalve, A. P. (2010). *Older adults in Colombia*. <http://www.psicomundo.com/tiempo/monografias/monsalve.htm>. Accessed 20 Aug 2013.
- National Department of Statistics (DANE). (2013). *National Planning Department*. http://www.dane.gov.co/index.php?option=com_content&view=article&id=354_&Itemid=114. Accessed 11 Sept 2013.
- Sacks, O. (2013). *At the age of 80*. http://elpais.com/elpais/2013/07/10/opinion/1373457617_864305.html. Accessed 13 July 2013.
- SENA. (2013). *National apprenticeship service*. <http://www.sena.edu.co/>. Accessed 17 Nov 2013.
- SISBEN. (2013). *System identification and classification of potential beneficiaries for social programs, Colombia*. <https://www.sisben.gov.co/default.aspx>. Accessed 11 Nov 2013.
- Social Action Rosarita. (2013). *Adults and seniors*. <http://www.urosario.edu.co/Accion-Social/ur/Accion-social/adultos-y-adultos-mayores/>. Accessed 15 Nov 2013.
- Technological University of Pereira. (2013). *Proposal specialization in education*. <http://www.utp.edu.co/~humanas/revistas/revistas/rev17/diaz.html>. Accessed 12 Apr 2014.
- Universia Colombia. (2011). *Zero illiteracy*. <http://noticias.universia.net.co/en-portada/noticia/2011/09/01/862768/programa-cero-analfabetismo-beneficiaria-colombianos-iletrados.html>. Accessed 12 Aug 2013.
- World Bank. (2013). *GDP per head (U.S. \$ at current prices)*. <http://datos.bancomundial.org/indicador/NY.GDP.PCAP.CD>. Accessed 15 Sept 2013.

Chapter 11

France

Dominique Kern

11.1 Introduction

The international visibility of older adult education in France is closely related to Universities of the Third Age. In addition to this emblematic idea, learning and training offers for an older public are many. Notably in the last years, various learning and training opportunities have been created and the evolution is still going on. For the future, one can identify different main domains for learning and training for retirees and older workers respectively, based in a variety of settings that range from leisure activities to volunteers locations to health sectors. Nevertheless, despite the accumulation of practical experiences, our knowledge on the most important aspects of older adult education are not known yet. The learning needs of older adults who do not engage in formal or non-formal education is a clear case in point. Research activities will be necessary for the carrying out of innovation practices in learning and training offers. Following a decline in education research in older adult education in the 1980s and 1990s, it is positive to note that studies in educational gerontology have taken a new impetus in recent years. There is, however, no doubt that more cooperation between educational practice and research is needed for developing further this relatively novel field of late-life learning.

D. Kern (✉)

Department of Education – Faculty of Arts, Languages and Humanities, University of Haute
Alsace, Mulhouse/Alsace, France

e-mail: dominique.kern@uha.fr

© Springer International Publishing Switzerland 2016

B. Finsden, M. Formosa (eds.), *International Perspectives on Older
Adult Education*, Lifelong Learning Book Series 22,

DOI 10.1007/978-3-319-24939-1_11

11.2 Beginnings of the Older Adult Education in France

On a political level, Pierre Laroque can be regarded as one of the founder of the retirement provision system (old age insurance) for older persons in France. In the now famous and classic *rapport Laroque* (Laroque 1962), he proposed the idea of older adult learning. The legislation on continuing education established on 16 July 1971 premised that training at all periods of life should permit all citizens to acquire knowledge, and all the relevant intellectual or manual skills, that is necessary to reach the highest potential of human development. The legal effect for older adult education of the law remains marginal, but at this moment in time Pierre Vellas created in Toulouse in 1973 the first University of the Third Age (Chamahian 2009). Considering by some as a stronghold of older adult education (Brasseul 1981), it is sure that the concept is the most successful French contribution to learning for older persons, even in a global perspective. Another starting point for the French training of older persons can be seen in the various organisations that install seniors clubs all over the country. Carré (1979) placed the first retirement club of the *Mutuelle General de L'éducation Nationale* (pension fund of French national education) (MGEN) in 1955. However, the first marks of systematic interest in education for older adults came later in France. Only in the late 1970s and early 1980s, papers about this subject were published in scientific French journals (Brasseul 1981). Scientific meetings such as the conference of the *Fédération de l'Education Nationale à Paris* (Federation of the National Education, a federation of teaching unions) (1979), the French-English conference of the Wye-College (1980), and the *Assises Nationales des Universités du 3e âge* (National meeting of the 3rd age universities) in Reims (1981) also focused on older adults education. Joffre Dumazedier, one of the important people of adult education in France also contributed to the reflection in Reims, a sign that one could be interpreted as encouragement for the durable integration of this new public in the scientific reflection on learning after initial education/training (Brasseul 1981).

The early 1980s also witnessed the first substantial scientific research work. Philippe Carré (1981a) wrote his doctoral thesis about learning projects of retired learners: contribution to studies of particularities of older adult learning and training situations. As the result of such a study, he succeeded in publishing several papers in specialised journals and created a working group on 'education and elderly' inside the National Gerontological Foundation (Carré 1985). In three papers that can be taken as a whole, published in the exemplary journal *Education permanente* (Permanent education), Carré researched the issue of older adult education and its relation with adult education in a systematic way. He determined that the first is included in the second in a way that they represent together the evolution toward a 'full continuing education' (Education Permanente Intégrale) (Carré 1979, 1980b, 1981a, b). Carré argued that the segregation of older persons in special training institutions seems unjustified in most cases and that chronological age is not the most significant variable differences people (Carré 1980a, 1981b). With this epistemological position, whilst arguing strongly for the integration of older adults in adult education, Carré developed a distinguished disciplinary positioning of the

field of older adult education—one which was contemporary to the writings of Peterson (1976, 1983) or Glendenning (1985)—and what many today would call the ‘French approach’ (Kern 2011). Of course, even if the full integration of older persons in adult education is the ultimate aim of educational gerontology, Carré admitted that special efforts need to be done to achieve such a goal. Generally, Carré’s epistemological reflexion is based essentially on American educational gerontologists such as Peterson (1976) and Nusberg (1982). Indeed his empirical studies observed that older learners within a retired club of the MGEN, the pension fund of the public servants of the French public education system (Carré 1979). After this intensive period only five doctoral thesis have been written in older adult learning between the years of 1981 and 2006 (Kern 2011). All these works focused in a general way on the capacity on learning of older persons with the aim to justify learning offers of retired clubs, universities of the third age, as well as training activities in long-term care. Unsurprisingly, all of them concluded that older persons are guided by a wish to engage in learning opportunities and that they should have access to adapted training programmes.

11.3 The Flagship Institution: Universities of the Third Age

The historical development of learning of older adults in France is characterized by powerful actors and disparity in matter of sustainability. Vellas created with the University of Third Age not only a new education institution but set the foundation for a worldwide movement that diversified the original idea in various manners (Formosa 2014). The project was influenced by empirical observations of Vellas who was struck by the economic and social underdevelopment of older persons (Chamahian 2009). The practical response corresponded to a necessity—or, the theoretical development of the argumentation was developed only some years later and not in a direct link to the university of third-age movement. Carré developed his reflection from a educational point of view and arrived at conclusions that still are relevant today, especially in matter of separating adults on the only base of chronological age. Parallel to this theoretical reflexion, Vellas advanced his empirical reflection and putt bases that were called to be reoccupied two decencies later (Formosa 2014). Vellas (1997), from a strictly gerontological point of view, formulated four key objectives for this new public – namely, (i) raising the quality of life of older people, (ii) realising a permanent educational programme for older people in close relational with other younger age groups, (iii) co-ordinating gerontological research programmes, and last but not least, (iv) realising initial and permanent education programmes in gerontology. This distinction between two different epistemological approaches, education sciences and gerontology, is an aspect which characterise research and academic discussions in this domain, not only in France.

The first University of the Third Age curriculum, at Toulouse, focused on a range of gerontological subjects, although in subsequent years subject content became mainly in the humanities and arts (Vellas 1997). The Union French University of the

Third Age was founded in 1980, and quickly sought to clarify the meaning of the word ‘university’ in the title, and therefore, which Universities of the Third Age are eligible to become members (Radcliffe 1984). The dominant view was that Universities of the Third Age should strive to maintain high academic standards by holding direct links with recognised and established universities, and to uphold the credibility of the label ‘university’ by increasing the proportion of university academic staff. As a result, although lectures were combined with debates, field trips, and recreational and physical opportunities, the French academic maxim of “teachers lecture, students listen” was constantly upheld (Percy 1993: 28). Indeed, all Universities of the Third Age during the 1970s operated through a more or less a strict ‘top-bottom’ approach, where the choice of subjects and setting of course curricula was the responsibility of university academics, and with learners expected to show deference to the intellectual eminence of university professors. As Formosa concludes,

In retrospect, there was nothing exceptional about this programme apart from the fact that a section of a large provincial university had taken an interest in ageing and decided to enlist the resources of the university in programmes for senior citizens. Yet, the Toulouse initiative struck a rich vein of motivation so that just three years later Universities of the Third Age were already established in Belgium, Switzerland, Poland, Italy, Spain, and Quebec in Canada. (Formosa 2014: 44)

Universities of the Third Age were probably also successful because retirees perceived such centres as offering them the possibility to continue engaging in physical and cognitive activities even beyond retirement, and to keep abreast of physical, psychological, and social changes occurring in later life (Glendenning 1985). This may be because the Universities of the Third Age movement was in marked contrast to the tradition of centralised educational management, and provided an opportunity to sow the first seeds of educational innovation and reform. In Radcliffe’s (1984: 65) words, “the [Universities of the Third Age] was in some measure an expression of a counter-culture, the resort of those to whom a fair measure of educational opportunity has been denied...a challenge in support of the right to life-long education”.

11.4 Contemporary Developments

In France, the practice of older adult education is able to tap on a favourable context, even if no legislation exists. On department and communal levels, several learning and training offers exist, mostly managed by non-profit organisations. Some of them are conceptualised on a scientific base, such as the ‘equity workshop’, and a stimulating activity programme which is presented further on in this chapter. Concerning research, after a time of latency, theoretical reflexion restarted with the creation of an interdisciplinary group of researchers focusing on that interface between learning and growing older.

11.4.1 *Practice and Political Context*

The French Economic and Social Council, a constitutional consultative assembly, affirmed in a report in 2001 the demand for the right of retired people for lifelong learning (*Conseil Économique et Social* [Economic and Social Council] 2001), a suggestion that was not included in laws yet. However, the national cross-industry agreement from 20 September 2003 to advocate the right for employees aged 45-plus to a personal skill assessment, a procedure that can result in a training. This factor represented a first sign for a further recognition of the pertinence of learning and training for older adults, even after retirement. Noting the absence of national laws about learning and training for older persons, the main actors in this domain are surely the community, supplementary pension funds, and non-profit organisations. With the passing of decentralization laws between 1983 and 1986, the responsibility for social action and social assistance for older persons is left to the *conseils généraux* – namely, the council of the department, second political level under the national and the regional and above the communes. These infra-regional executive instances develop a multi-annual gerontological plan that can include also learning and training aims. Thus, it can play a coordinating role for all actors in the field. The third age universities still exist in several towns. But, appellation as well as legal status changed! Indeed, official services of Universities of the Third Age, close to the concept of Vellas, changed in 1990 years to become non-profit organisations. Despite remaining close to Universities by engaging lecturers, they are in reality independent and changed for the mostly also the name. The University of Leisure (Lille), Inter-age University (Nice) or All Age University (Lyon) are only some examples. Further details about this evolution can be found in the doctoral thesis of Chamahian (2009).

Many other non-profit organisations are offering training and learning opportunities for older people. One can name non-profit organisations who propose already medical and sanitary services for dependent elderly (support at-home care) and who are enlarge their offers to learning and training, including for volunteers (for example APALIB' and ADEIPA, in Alsace). As actors traditionally close to the people, cities and towns propose fun and recreation activities for older persons, some of which even contain elements of learning and training (Kern 2007). There are no exhaustive research results about, but by reading local pages of newspapers, one can even daily note a multiplication of offers for learning such as information and technology courses, updates for older drivers, safety in public transports etc. Without doubt, it will be a next challenge for French researchers to close the knowledge gap by making an exhaustive inventory of the offers.

It is significant that competent and professional actors of education in later life are the supplementary pension funds. This chapter presents brief reports of two structured offers which were developed in multidisciplinary teams in the 1990s. The 'equity workshop' is a training program for older persons to learn how it is possible to prevent falls. Sessions are organised by non-profit organisations or municipalities

but the procedure is based on a label created by the regional sickness insurance funds (CARSAT 2013). Participants learn to prevent falls as well as manage situation after falling for getting up again. Constructed by an interdisciplinary team in the 1990 years, monitored, evaluated and improved, the program is still running in several region of France (CRAM 2005).

The *Mutuelle Sociale Agricole* (supplementary pension fund of the agricultural sector) (MSA) and the *Fondation Nationale de Gérontologie* (National Gerontological Foundation) developed the cerebral activation program 'Pac Eureka'. Based on the theoretical frame of the neuro-pedagogy and the psycho-pedagogy, the program aim for prevention of cognitive decline (de Rotrou 2001). In groups of 10–15 participants, older adults practice exercises involving one or various cognitive functions guided by an animator, often a volunteer specially formed in the application of the methods. The training sessions follow a similarly rhythm, including leisure and training modules. The exercises have a fun-character and concern the attention, technic of information organisation, technics of reminding and orientation in space and time as well as mnemonic. Above cerebral activation, the trainings allows participants to create social contacts that are supposed to continue after the end of the 15 sessions. All exercises are collected in a briefcase with application instructions so that participants can continuing trainings after the end of the program. The aims are to learn to develop and maintain cerebral faculties, that means, make working the brain, reduce difficulties and prevent worsening, promote opening for social and physical environment and improve the self-confidence. Initially, the programme intended to prevent isolation in rural areas.

To resume, one can note a wide range of learning offers for older adults and some of them, such as the ones presented above, are constructed on a scientific base and improved systematically. It is not possible to affirm other facts at the moment, because of the absence of representative search results. A closer view to a special aspect is probably not significant. However, it is interesting to observe that in appellations of offers, terms referring to education activities like training, lesson or course are avoided. They are rather called workshop or programme. It is risky to conclude from the name on the content. But, knowing the large absence of writings about theoretical and methodological conceptualisation of education for older adults in French as well as some few, not representative research results (Kern 2007), one can make the hypothesis that most of the existing offers do not referring to activities constructed on a educational scientific base and that they are seen more as entertainment event than as learning activity. The two examples presented herein are, in this case, exceptions.

This hypothesis about the non-educational character of offers is not a statement on the quality of them. But, if there is no systematic and methodological educational conceptualisation of the offers, it is probable that aspects like the orientation on participants or the integration of their needs are not guaranteed. We will come back on this epistemological questions later in the text.

11.4.2 Academic Pursuits

After a dynamic beginning of the research about older adult education in France, academic research in this area has remained rather weak in the past three decades. However, in the last years, the thematic reappear in form of doctoral thesis (Kern 2007; Chamahian 2009) and several Masters' thesis. In the last three congress of educational research (AREF), symposiums have been organised about the characteristics of learning of older adults (Strasbourg 2007, Geneva 2010, and Montpellier 2013). The small group of French speaking searchers, gathered around this events, meet regularly and aim to promote the thematic for the colleagues but also for the Bachelor and Masters' Students. In this sense, two seminars were organised under the title "learning and ageing" at the University of Upper Alsace in Mulhouse in 2011 and 2013. At the same times, works about the special learning situation of older employs like the results out of a large qualitative research about the senior-training and the intergenerational relations in firms has been published (e.g. Collette et al. 2009). The interest on working older adults seems to be more developed than on retired persons. The timid but hopeful beginning of systematic exchange between searchers bring to light the necessity to going further in the cooperation and to enlarge vision by establishing contacts with non-French-speaking colleagues.

11.5 Future Challenges

As this chapter has already noted, there is a large range of educational opportunities for older adults, but they are mostly not declared as learning initiatives but rather as leisure or entertaining activities. Universities of the Third Age are therefore a notable exception. Moreover, because of absence of systematic research in the last 30 years, providers cannot resort to conceptual support. This does not necessarily demean the quality of work with older adults, but the limits of exclusively empirical based research surfaces clearly. Therefore, exchange between stakeholders of the practice-field and searchers shows the proximity of reflexion which turns around questions like the creation of new offers responding to not yet known needs, specific needs in the health sector or the integration of public far from education.

11.5.1 Opportunities

As already noted, systematic research about offers do not exist yet in France. But, regarding existing provider organisations as well as learning needs identified by professionals from different areas working with older adults, for categories of offers emerge. They concern older employees, leisure activities for retired older adults,

training for volunteers as well as health education and specifically therapeutic education. A general thematic concerning professionals as well as political and administrative decision-makers lie in the integration of the 'non-public'. In fact, how to reach older adults far from education is up to become a central question in the domain.

11.5.2 Older Employees

After the abandonment of the politics of advanced retirement in the beginning of the 2000 years, the question of the maintenance of job opportunities for older adults has become a primary preoccupation of political, economical and labour unions (DARES 2011). As the vocational training system was for many years solely focused on younger learners the knowledge about the training for older adults in the professional field need to be firstly developed. The main challenge in this area lies in the management of differences in training offers. How to organise trainings with learners with different cognitive capacities, motivation, experience etc.? Should they be separated in homogenous groups? If not, methods need to be developed to sustain trainers in management of diversity.

11.5.3 Leisure Activities with Learning Orientations

The extensive field of formal leisure activities for older adults has existed for more than 60 years. Even if the education factor is not always obvious or even intended, one can recognise learning aspects in the aim-definitions as well as in the motivation of participants. Providers are various and disparate, going from senior clubs to University of Third Age to activation activities in retirement homes (EHPAD). Different institutions like public libraries, older adults organisations, supplementary pension funds, or official services on governmental as well as local level ask themselves about the way to support learning of older adults. Of course, their aims are strongly linked to their specific missions. The health minister publishes for example a leaflet informing older adults about behaviour to adopt and contact options in case of heat-waves – reminiscence of the events in summer 2003 which causes many thousand decease in the elderly population in France. The objective of the information is to introduce a learning process for changing specific behaviour. The question is here how to conceptualise and present information and on which communication support, for reaching the intended target audience. It is about the generic problematic on how to sustain non-formal learning processes.

11.5.4 Training for Volunteers

Another developing domain is the training of volunteers. Many older adults engage themselves already in society in private and public areas. The question which arise here turn around the competences necessary for volunteer work with people outside the familiar circle. Tutoring for school-children or animation of work-shops for other older adults are only two examples of a wide range of engagement opportunities. Acquisition of special skills by the older volunteers seems important to guarantee a minimal quality level. Organisations of the non-profit sector develop offers in this domain without systematic financial support. One can imagine that this subject will be considered in the future as important enough by legislator, first of all in a societal dimension concerning place and recognition of older adults.

11.5.5 Health and Therapeutic Education

The fourth domain concern the health sector. General health education and specific therapeutic education for older adults suffering of chronically disease like diabetes are learning priorities identified by the specialists. Several activities are existing but, the same question like in the other domains appears: how encouraging and support older and oldest adults to acquire specific skills. If some of the public encounter no problems with the actual learning methods and offers, resistance of others push the professionals to enter in epistemological and practical reflexion. Resistance against learning activities are generally a challenge for practice. People far from education are non publics of formalised learning activities, also in the old age. Considering that ageing need adaptation efforts to face changes, learning activities can be considered as essential in whole life-spans. One can suppose, that an important number of older adults that do not participate at formalised learning offers may learn in informal context. But it is a fact that some older adults are encounter problems in adaptation of changes. Identifying this public, knowing their needs and construction referring offers are challenges for the professionals. These prospective suppositions are showing that the field of older adult education is probably promised to a rich development in the next years. At the same time, the necessity of stronger implication of research to construct and reinforce the knowledge base appears as evident.

11.5.6 Academic Themes

The above listed questions in the professional area need the cooperation with academic research. A problem in France is the already mentioned little implication of researcher in Education Sciences. Thus, the target for the near future is to develop research activities in this domain and to develop a common epistemological base. A

strong cooperation with the practice field is therefore an imperative. With the mentioned group of searcher and scientific activities, a first base is already constructed. It is up know on communicating the thematic to a larger range of searchers and to enforce relations with the practice. The implementation of the thematic in bachelor and master studies need also to be developed. In fact, at the moment, only the University of Haute Alsace in Mulhouse offers special classes about older adult education. An important activity will be also to recruit future searchers and accompany the young one already engaged in this subject. Compared to other subjects of education sciences, like the school education which is strongly related to cultural and historic framework, older adult education is a completely new field. One can suppose, that the virgin character, without legal or institutional anchoring, favours the development of an international shared epistemological base, making easier transnational cooperation in research and practice. By establishing exchange and cooperation with European colleagues, the domain of older adult education can be showed as attractive orientation for young searcher. In this respect, the Network on Education and Learning of Older Adults (ELOA) from the European Society for Research on the Education of Adults (ESREA) provides substantial support.

11.6 Coda

Older adult education has become in France, like in all countries following similar demographic trends, a reality. In addition to leisure activities one locates learning and training offers for older people who aspire to develop themselves by acquiring knowledge or new skills or maintain the existing. The plural character of audience push developers to adapt offers to the various needs. Research will contribute to this development not only by questioning practice about adequacy of offers, but by examining the epistemological context of older adult learning and identifying the contemporary gaps in theory and practice. Identifying ways to recognise needs of older persons who do not participate normally at learning activities is without doubt one of the future priorities for the field of older adult education.

References

- Brasseul, P. (1981). Préface [Preface]. In Ph. Carré (Ed.), *Retraite et formation, des universités du 3e âge à l'éducation permanente* [retirement and education, from the third age universities to the permanent education] (pp. 9–14). Paris: Education permanente/Eres.
- Carré, P. (1979). Le troisième âge de l'éducation permanente: Retraite et formation I: On peut apprendre à tout âge [The third age of permanent education: Retirement and education I: One can learn in every age]. *Éducation Permanente*, 51(1), 83–96.
- Carré, P. (1980a). Gérontologie Éducative et Psychopédagogie: Spécificité des situations de formation à l'âge de la retraite et unité de l'éducation permanente [Educational Gerontology ans psychopedagogy: Specificity of training situations in retirement age and unity of permanent education]. *Gerontologie et Societe*, 13(1), 29–39.

- Carré, P. (1980b). Le troisième âge de l'éducation permanente [The third age of permanent education]. *Éducation permanente*, 56(1), 43–69.
- Carré, P. (1981a). *Projets de formation d'apprenants retraités: Contribution à l'étude des spécificités des situations de formation d'adultes* [Learning projects of retired learners: Contribution to a study of specificities of adult learning situations]. Thèse de doctorat en Sciences de l'Éducation. [Doctorate Thesis in Education Sciences]. Paris: Université Paris 5.
- Carré, P. (1981b). Gérontagogie ou éducation permanente intégrale? [Gerontology or full permanent education?]. *Éducation permanente*, 61(1), 107–125.
- Carré, P. (1985). Education des adultes et gerontology: origine d'une rencontre [Adult education and gerontology: Origin of an encounter]. *Gerontologie et Société*, 33(1), 39–44.
- CARSAT. (2013). *L'équilibre, où en êtes-vous ? des ateliers pour prévenir les chutes chez les personnes âgées* [The balance, where are you? workshops to prevent falls in the elderly]. <http://www.carsat-bfc.fr/index.php/news-ass-equilibre>. Accessed 24 Sep 2013.
- Chamahian, A. (2009). *Vieillir et se former à l'Université et dans les Universités tous âges – Sociologie de l'engagement en formation à l'heure de la retraite* [Age and studying at the University and the all age Universities – Sociology of commitment to training at the time of retirement]. Thèse de doctorat en sociologie non publiée, Université de Lille 3 Charles de Gaulle, France [Doctorate thesis in Sociology, not published, University of Lille 3 Charles de Gaulle, France].
- Collette, S., Batal, C., Carré, P., & Charbonnier, O. (2009). *L'atout senior – relations intergénérationnelles, performance, formation* [The senior asset – Intergenerational relations performance, training]. Paris: Dunod.
- Conseil Économique et Social [Economic and Social Council]. (2001). *Les personnes âgées dans la société – avis et rapport présenté par Maurice Bonnet* [Elderly in society – Opinion and report presented by Maurice Bonnet]. Paris: Journaux officiels.
- CRAM. (2005). *Bilan de dix années de campagne « L'Équilibre, où en êtes-vous ? » en Bourgogne* [Results of ten years of campaign "Balance, where are you?" in Burgundy]. *Sans lieu (no place): Observatoire régional de la santé de Bourgogne*. (Regional health observatory). http://www.carsat-bfc.fr/images/Action_Sanitaire_Sociale/PDF_2013/rapport_equilibre_simplifie_diffusable.pdf. Accessed 24 Sep 2013.
- DARES. (2011). *Les accords collectifs d'entreprise et plans d'action en faveur de l'emploi des salariés âgés: Une analyse de 116 textes* [Collective enterprise agreements and action plans for employment of aged employees: An analysis of 116 texts]. http://travail-emploi.gouv.fr/IMG/pdf/DE157_accordssalariesages_final.pdf. Accessed 7 Oct 2010.
- de Rotrou, J. (2001). Stimulation et éducation cognitives (Stimulation and cognitive education). *Gerontologie et Société*, 97, 175–192.
- Formosa, M. (2014). Four decades of Universities of the Third Age: Past, present, and future. *Ageing and Society*, 34(1), 42–66.
- Glendenning, F. (1985). Education for older adults in Britain: A developing movement. In F. Glendenning (Ed.), *Educational gerontology: International perspectives* (pp. 100–141). Kent: Croom Helm Limited.
- Kern, D. (2007). *La prévention de l'isolement à travers la formation tout au long de la vie spécifique aux personnes âgées – étude sur les besoins de formation des personnes en transition entre l'âge de la retraite et le grand âge* [The prevention of isolation of older people by life long learning – A study of educational needs of persons in the transition between age of retirement and high age]. Thèse de doctorat en Sciences de l'éducation soutenue le 26 juin 2007 à l'Université de Haute Alsace [Doctorate Thesis in Education Sciences, defended the 26 of June 2007 at the University of Upper Alsace].
- Kern, D. (2011). Vieillesse et formation des adultes – Note de synthèse [Aging and adult education older – Executive summary]. *Revue Savoirs*, 6(1), 13–59.
- Laroque, P. (1962). *Politique de la vieillesse* [Old age policy]. Paris: La Documentation Française.

- Nusberg, C. (1982). Educational opportunities for the elderly in industrialized countries outside the United States. *Educational Gerontology*, 8(4), 395–409.
- Peterson, D. A. (1976). Educational gerontology: The state of the art. *Educational Gerontology*, 1(1), 61–73.
- Peterson, D. A. (1983). *Facilitating education for older learners*. San Francisco: Jossey-Bass.
- Percy, K. (1993). *Working and learning together: European initiatives with older people*. A report of the annual conference of the Association of Educational Gerontology held in 1993, the European Year of Older People and Solidarity between Generations, Glasgow, 1–4 July 1993.
- Radcliffe, D. (1984). The international perspective of U3As. In E. Midwinter (Ed.), *Mutual aid universities* (pp. 175–192). Kent: Croom Helm Limited.
- Vellas, P. (1997). Genesis and aims of the Universities of the Third Age. *European Network Bulletin*, 1, 9–12.

Chapter 12

Germany

Bernhard Schmidt-Hertha

12.1 Research on Learning of Older Adults

Research on learning in later life has quite a short history in Germany. Starting in the late 1960s, gerontologists were the first to address the topic (Thomae and Lehr 1968), before educational researchers began asking for ‘gerontagogy’ as a new discipline that should focus on education in later life, in particular (Arnold 2000). In the 1970s, research on the education of older adults raised the topic of educational disadvantages of older cohorts, and, for the first time, didactical concepts for the educational programmes dedicated to older adults were developed (ibid.). When looking at the most important database for German publications in the field of educational research, first articles on learning in later life can be found for 1980, addressing e.g. preparation for the post-employment phase of life (Winter 1980) or the significance of learning in later life (Glaser 1980). Heterogeneity of older adults and ageing was explored in the 1980s, and it seems that topics haven’t changed much over the last three decades. However, the source of empirical evidence has grown and more elaborate and differentiated concepts of learning in later life have been developed. Some of the central topics that seem to be at the focus of research in Germany are, among others, (i) participation of older persons in adult education, (ii) educational offers for the third and fourth age, (iii) learning interests and barriers of older adults, their educational needs and demands, (iv) the significance of communal experiences of generations and of individual biographies, (v) the influence of current living conditions and of educational experiences gained in the past on present learning interests, and (vi) the self-perception of older learners.

B. Schmidt-Hertha (✉)

Institute of Education, University of Tuebingen, Tuebingen, Germany

e-mail: bernhard.schmidt-hertha@uni-tuebingen.de

At a first glance, it seems that non-formal learning activities decrease continuously with age (BMBF 2015). However, when taking a closer look, a more differentiated picture becomes visible, at least with regard to Germany. Firstly, it seems that participation rates in adult education in the field of non-vocational adult education are not related to age, as participation rates are more or less the same for all age groups (Tippelt et al. 2009a). Secondly, activities in continuing vocational education seem to decrease significantly with age. However, this effect is reduced considerably once employment status and level of schooling (which is lower in the older cohorts) are taken into account (Aust and Schröder 2006). There still is a significant difference between younger and older workers regarding participation rates but, thirdly, it remains unclear whether this is due to an age effect or to a cohort effect (Eckert and Schmidt 2007). In other words, as long as we only have cross-sectional data – and this is the case for Germany – we cannot say whether employees reduce their educational activities with age or whether older generations of employees have been less engaged in continuing vocational education throughout their lives than younger generations are.

There are only a few programme-analysis studies in the German-speaking region showing the range and quantity of educational offers for older adults (Horn and Ambos 2013; Kolland 2006). However, a lot of practice-oriented action research projects and best-practice-studies give an insight into educational programmes for later life in Germany (see next section). The success of highly different conceptions – age-homogenous or age-heterogeneous groups, traditional lectures or blended learning courses, teacher-oriented or learner-oriented, etc. – indicates the diversity of older learners and their different needs and interest.

Learning interests, needs, demands and barriers are as diverse as older peoples' lives (Tippelt et al. 2009a, b). There is a group of well-educated older adults who can be found in senior citizens' academies (Schnücker 2000) and Universities of the Third Age. They use their post-employment phase of life to follow educational interests which sometimes are in contrast to their former vocational activities. With a high level of learning experience and clear expectations towards educational programmes, they can be seen as a demanding target group with less learning difficulties than others. In contrast, disadvantaged older adults who finished school with a basic degree and often haven't participated in adult education for many years have to overcome a lot of fears and worries before engaging in adult education. While the first group usually prefers learning groups of mixed ages, disadvantaged older adults prefer homogenous learning groups as they provide some kind of safety for them, since they expect that all others in the group will have to cope with similar learning difficulties (Schmidt and Tippelt 2009). There is quite a lot of additional differentiated research work on learning interests, needs and barriers of different (older) target groups, stemming from research on social milieus, gender, or disadvantaged groups.

As mentioned earlier, learning in later life can be seen not only as a matter of age but also as a matter of typical educational experiences and socialization processes of cohorts. Having gone to school during the Second World War or in the post-war period has mediated certain ideas about learning and education that have had and still have an impact on learning over the lifespan (Herzberg 2004). Therefore,

similar ideas related to learning have been found within one generation and can be explained by a common generational location and a generational consciousness (Mannheim 1928). Nevertheless, individual biographies, too, have an important impact on the meaning of education and learning for older adults; educational experiences related to crisis and radical changes in the life history, in particular, shape the meaning of learning for individuals (Schmidt 2009). Thus, the biography is not only an important point of origin for all learning processes, but is also seen as an important topic for learning in later life. So-called biographical learning focuses on the reflection of the individual life history and constitutes one of the main approaches in educational programmes for older adults (Kade 2007).

In addition to former experiences in learning and education, which shape current educational interests and beliefs, the living environment, including social networks, has a strong impact on learning activities in later life. It is not only the opportunities for informal learning that are closely related to individual lifestyles, but also the ability to finance educational activities, access to networks informing about educational offers and the mobility needed to visit educational providers. Current research in Germany points to the relevance of family ties, civic engagement, and region of residence for learning opportunities and activation of competencies (Friebe and Schmidt-Hertha 2013). Although these factors are above all important with regard to informal and incidental learning, support by relatives and friends also seems to be relevant for participating in adult education programmes. Last but not least, experiences gained in former adult education activities also define a person's image of adult learning and do play a role in deciding whether or not to participate in adult education in later life (Theisen et al. 2009).

The most recent German report on ageing, edited by the German Government, focused on images of ageing and their relevance to active ageing and well-being in later life (BMFSFJ, 2010). Adult education and learning is related to images of ageing in two ways. Firstly, engagement in learning and education at an older age depends very much on individual and cultural ideas of ageing. If people are convinced that learning skills decrease or vanish with age, they will be afraid not only of organised educational offers but also of all types of structured learning processes (Schmidt-Hertha and Mühlbauer, 2012). Secondly, adult education can contribute to the promotion of a realistic view on ageing and can help overcome negative age stereotypes. Intergenerational learning can be a good strategy for trying to achieve this aim (Franz 2009). This issue is not only of significance to older adults; rather, negative images of ageing should be discussed at an earlier stage in life, before they become an inherent part of people's self-image (Levy 1996).

Overall, in the last decades, there has been an increase in important research on learning and education in later life in Germany. While, in the early years, the different disciplines – such as gerontology, educational science, psychology, and sociology – acted more or less separately in this field, there now is an interdisciplinary exchange, although interdisciplinary research projects on this topic are still rare (e.g. the professorship for interdisciplinary research on ageing at the University of Frankfurt/Main).

12.2 Initiatives to Promote Learning in Later Life

Not only in gerontology and educational research, topics related to the learning of older adults have changed during the last six decades. While, in the 1960s, older adults as learners were first addressed by social workers, in the 1970s, institutes of adult education in West-Germany started offering courses especially designed for senior citizens (Arnold 2000). The emphasis at that time was on preparing older adults – in particular older men – for the post-employment phase of life and on offering leisure activities for disadvantaged senior citizens – in particular older women, before the first universities started opening their gates to older learners in 1979 (Veelken 2000). In the German Democratic Republic (GDR), older adults did not constitute a special target group for adult education at all. As the main aim of the GDR government was to prepare people for their work, there was no political interest in educational programmes for adults in their post-employment phase of life (Olbertz and Prager 2000). In the 1980s, the term “senior citizen” started being en vogue in adult education in West-Germany and courses were designed for diverse older target groups with regard to their life situation. With the number of older adults in adult education institutions growing steadily (Tippelt 2004), the potential of their knowledge and experience was discovered and intergenerational learning became increasingly popular – even though that label was not being used then. At the same time, self-help groups of older adults started becoming popular, offering rich learning opportunities in a more informal manner (Arnold 2000; Zeman 2000). Nowadays, too, informal learning plays an important role in later life and older adults are primarily seen as self-directed learners, prepared to assume responsibility for their own learning processes (Stadelhofer 2000).

In recent years, different initiatives and programmes have been aimed at, promoting learning in later life and funding research on ageing and on the consequences of demographic change in Germany. As education in general is an affair of the different *Länder*, initiatives by the federal government primarily address research programmes, though some also support educational programmes. However, state funding in the field of adult education seems to be focused on the development of labour force – as it is promoted by the European lifelong learning programme (Wildemersch and Salling Olesen 2012). To promote vocational training for older workers, the so-called WeGebAU programme has been implemented, which facilitates training for older and low-skilled employees through financial support aimed at helping with the training fees and at balancing the loss of working hours for the employers. For older adults in their post-employment phase of life, no state initiatives promoting learning activities have been found, which may be due to the fact that, to date, older adults in Germany are still quite wealthy in average and most of them – though not all – can afford to spend money on educational activities (Brödel and Yendell 2008).

Besides programmes initiated or funded by the state, there are many more activities of federations and associations, such as the Federal Association Team of Senior Organizations (BAGSO). They started, among others, different initiatives to promote

the use of digital media in later life and to provide an overall view of educational offers for older adults. An initiative with a similar goal, but organised by a commercial organisation, is the *SeniorenBildungsMesse* (Education Fair for Senior Citizens), which takes place in different cities throughout Germany (<http://www.seniorenbildungsmesse.de>). Furthermore, there is a large number of initiatives, programmes, and networks for education and learning in later life on the local and regional level, which would be too much to list here. All in all, it seems that most of the activities aimed at promoting learning in later life that arise in the communities are driven by engaged citizens and not so much by public institutions or government agencies. Programmes initiated by organisations mostly focus on the local or transnational level, in the latter case often financed by the European Union or European Commission respectively.

12.3 Social Disparities

The willingness of older adults to engage in learning as well as the preconditions for doing so are strongly related to the biographical background, on the one hand, and to their current life situation, on the other. In line with that, different educational interests and learning barriers have to be seen as a product of processes of personal development and individual experiences as well as a result of social structures within the society. However, learning opportunities and educational offers are dependent on framework conditions set by the social structure and the life world in the same way as they are formed by individual preconditions of learning on the social, the emotional and, above all, the cognitive level (Strobel et al. 2011).

The diversity of life styles and life situations has increased steadily in the last decades, as a consequence of a more individualized and pluralized society with a growing life expectancy. As early as the 1990s, a structural change in old age became apparent in Germany, which manifested itself in a trend towards ‘de-professionalization’ of older people and towards rejuvenation, feminization and singularization of old age as a part of the life course (Tews 1993). At the same time, the number of very old people in Germany is growing continually. Late life is characterized by transitions which present a challenge to the individual and influence a person’s development sustainably. These transitions also have an important impact on society, which is above all true for the transition into the post-employment phase of life, but also for grandparenthood, for the death of immediate family members or friends and for a reduced autonomy in lifestyle choices due to illness or to the need for long-term care. All these transitions have the potential to initiate learning processes in later life, even among the very old.

Both social inequality and different lifestyles have a strong influence on learning in later life, – the first of these with regard to formal and non-formal education, in particular, the second above all in the field of informal learning in everyday life. Older adults’ participation rates in adult education are highly dependent on their initial education, as is the case for younger adults. In the group of adults aged

between 65 and 80, this means a participation rate of 26 % for adults with a higher level of schooling compared to 7 % for adults of the same age, but with a lower level of schooling (Tippelt et al. 2009a, b). Besides the level of schooling, gender, occupational status and leisure activities turn out to be the most significant predictors for participation in adult education in later life. Controlling for these predictors, no significant correlation between age and adult education activities can be found.

Whether older adults actually participate in adult education depends very much on their lifestyle and their biography. However, most learning in later life happens outside of educational programmes, although it is influenced by previous learning experiences, the social environment, and personal lifestyle in a pretty much the same way. Informal learning in later life is reliant on opportunities and impulses to learn as well as on individual learning competencies. German studies have shown that informal learning activities are more intensive and more diverse when older adults have a higher level of initial education, when they are more involved in civic engagement, or when they have an active lifestyle. In addition, the family situation seems to play a role here, insofar as caring for grandchildren can be considered an important learning opportunity, when the older adults have to help with homework or widen their range of leisure activities together with the grandchildren (Friebe and Schmidt-Hertha 2013).

In order to make use of these learning opportunities, provided by the family and the social environment, the ability to learn and knowledge of how to learn are needed. Learning to learn can be seen as a central task of adult education, but first of all it is a product of initial education. Studies carried out in Germany have shown that people who regularly participate in adult education feel more confident with learning, have a more positive view on their own learning competencies, and are more open minded when it comes to intergenerational learning (Schiersmann 2006). Engagement in learning activities during the life course is thus an important predictor for educational activities in later life and, at the same time, it is grounded in early learning experiences gained in school, university, or vocational training. Some case studies, however, have shown that even negative experiences gained in initial education can be neutralized by significant positive experiences with adult education in connection with far-reaching changes in the life course (Schmidt 2009).

12.4 Challenges and Perspectives

In 2010, the sixth report on older persons – commissioned by the German federal government – was published (Bundesministerium für Familie, Senioren, Frauen und Jugend [Federal Ministry of Family, Seniors, Women, and Youth] 2010). The report does not only evaluate the current political discussions on demographic change and an ageing society, it also provides some crucial information for educational institutions. The report promotes a lifestyle marked by individual and joint responsibility as well as a differentiated view on age and ageing as guiding principles for a society of longevity. This also means taking into account that processes of

individual development can be shaped throughout a person's life, that use can be made of older adults' potentials, and that there now is access to resources of society that is by far better for older adults today than it was for previous generations. Stereotypes and one-sided images of ageing cannot reflect the diversity of ageing and appear to be counterproductive on both the individual and the societal level. In contrast, civic engagement and intergenerational learning become more relevant with respect to new demographic conditions. Following this report on older persons as well as current research projects carried out in Germany, some important topics for education and learning in later life have become apparent, which, however, have hardly been recognised so far.

First, the field of working and learning in later life – in particular after the legal retirement age, which used to be 65 and has now been raised to 67 – and the significance of second careers in people's learning biographies, especially for educational providers and for employers, is not on the agenda. Even though the number of older people who want to go on working after their legal retirement or who have to do so because of financial reasons is growing steadily, there is almost no research on this section of the workforce that actually focuses on the learning needs and opportunities of these older workers. In 2011, about 756.000 adults beyond the legal retirement age were still in work, 40 % of them self-employed, another 40 % as white-collar workers and about 20 % as blue-collar workers. This means that one out of ten older adults between the age of 65 and 70 is still (or again) in work (see Fig. 12.1).

Despite these large numbers of older workers, hardly anything is known about learning for and at work after the legal retirement age. Research is needed on the significance of work in older age and on second careers chosen because of the individual economic situation, for social reasons or for self-fulfilment.

Second, so far the development of competencies has been discussed exclusively for earlier stages in life (childhood, youth, and early adulthood). As far as competencies in later life are concerned, the focus has usually been on losses or on the prevention of a decline in competencies respectively. In contrast, gerontological studies pointing to an increase in competencies in later life – often discussed under the label of 'wisdom' (Baltes and Staudinger 2000) – have been recognized by non-vocational adult education (in particular in intergenerational

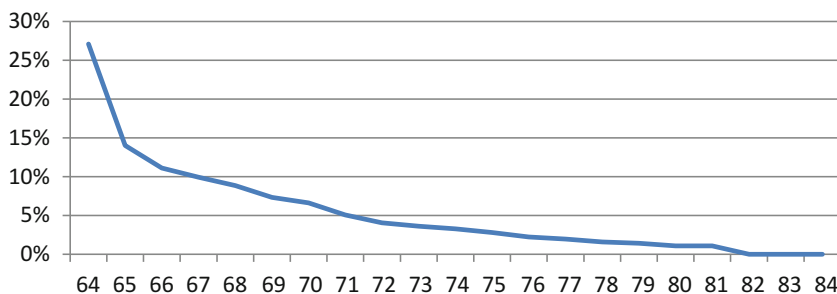


Fig. 12.1 Rate of older adults in work in 2011, in relation to age (Source: Federal Statistical Office (2012))

learning initiatives), but have been widely ignored in educational programmes for older workers. Insofar, the educational practice is called upon to recognize the potentials of older workers and their competencies, and research is needed to gain knowledge on the development of competencies in later life. A current research project in Germany is working on that and will deliver results in 2014 (Friebe and Schmidt-Hertha 2013).

All the educational inquiries listed above have one thing in common. They focus exclusively on healthy adults up to the age of 80 and almost nothing is known about the learning of the very old. However, in Germany, too, the number of adults beyond the age of 80 is steadily increasing, just as is the number of people with dementia (prognosis for Germany: 2.6 million by 2050). Although there are diverse offers for very old adults suffering from dementia, these are solely cognitive trainings provided by gerontologists and physicians, but not educational programmes focusing on a more holistic form of education. Educational programmes in that sense might help people afflicted by dementia and their relatives, once they've been informed of the diagnosis, to consciously reflect the expected psychological, everyday practical and social-communicative demands, to adapt to them and to develop strategies of coping with them. In any case, skills needed to cope with and solve everyday tasks may also constitute a field of learning relevant to healthy adults in extreme old age, since it would allow them to reflect on their own biography and to prepare themselves for the last phase of their lives. The needs and learning abilities of this age group have as yet hardly been explored, despite the fact that the group of the very old is one of the most expansive. In 2009, 1.5 million people older than 85 years of age were living in Germany, and for 2050, their number is expected to rise up to six million (Federal Statistical Office 2012), which means that one out of 12 German residents will belong to that age group.

With the demographic changes, educational research and practice is becoming more and more aware of the relevance of images of ageing to older adults' well-being, to their position in society, but also to their learning. So far, there have been but very few initiatives in Germany to change or prevent negative stereotypes about older people and ageing through educational programmes, something that has a long tradition in other countries, like the USA. The challenge that confronts adult education in this context is to work with realistic ideas of old age and ageing that take account of both the possibilities of active ageing and the risks of decreasing physical and cognitive abilities, not only when addressing the older adults themselves, but also when dealing with the younger ones. The latter is very important as stereotypes developed in younger years may be transferred to one's self-perception when getting older and may thus affect a person's process of ageing, acting like a self-fulfilling prophecy (Levy 1996). Furthermore, living together with different generations and age-groups in a society of longevity requires more knowledge about age and ageing for all.

12.5 Conclusions

Since educational programmes for older adults as well as research in that field have quite a long history in Germany, at least half a century, a lot of knowledge, experience and competence in that field can already be found. However, with the emerging discussion on demographic changes in the last decade and some political initiatives related to that issue, the topic now seems to be much more present in the minds of those who are responsible for educational programmes and for their funding. Some more recent developments might advance the progress of research on and offers for learning and education in later life, three of which will be named here. First, educational research and gerontology not only seem to have taken notice of one another, but also have started working together, following international impulses in that field (e.g. Findsen and Formosa 2011). Second, the practice of late-life education has become more inspired by research, and tries to accommodate the heterogeneity of its target group and the diverse educational needs by further differentiating the educational offers. And finally, that the learning needs and interests of the oldest members of older persons are still not on the agenda of most educational providers, although one notes an intensive discussion on dementia as a future challenge for society, on its prevention, and on ways to slow down its progression, triggered by medicine and gerontology. It is to be expected that, in the near future, educational practice and research will focus more strongly on fourth age learning. So far, the potential of educational programmes in that field has not quite been recognised. However, once this happens, it may offer the chance of obtaining more funding, even for educational programmes focusing on the group of adults experiencing physical and cognitive challenges.

References

- Arnold, B. (2000). Geschichte der Altenbildung [History of older adults' education]. In S. Becker, L. Veelken, & K. P. Wallraven (Eds.), *Handbuch Altenbildung. Theorien und Konzepte für Gegenwart und Zukunft* (pp. 15–38). Opladen: Leske & Budrich.
- Aust, F., & Schröder, H. (2006). Weiterbildungsbeteiligung älterer Erwerbspersonen [Training of older workers]. In Deutsches Zentrum für Altersfragen (Ed.), *Beschäftigungssituation älterer Arbeitnehmer. Experten zum Fünften Altenbericht der Bundesregierung* (pp. 93–128). Berlin: DZA.
- Baltes, P. B., & Staudinger, U. M. (2000). Wisdom. A metaheuristic (pragmatic) to orchestrate mind and virtue toward excellence. *American Psychologist*, 55(1), 122–136.
- Brödel, R., & Yendell, A. (2008). *Weiterbildungsverhalten und Eigenressourcen. NRW-Studie über Geld, Zeit und Erträge beim lebenslangen Lernen* [Educational behaviour and personal resources. NRW-study on money, time and benefits in lifelong learning]. Bielefeld: WBV.
- Bundesministerium für Familie, Senioren, Frauen und Jugend [Federal Ministry of Family, Seniors, Women, and Youth] (2010). *Sechster Bericht zur Lage der älteren Generation in der Bundesrepublik Deutschland: Altersbilder in der Gesellschaft* [Sixth report on the situation of the older generation in the federal republic of Germany: Images of ageing in the society]. Berlin: BMFSFJ.

- Bundesministerium für Bildung und Forschung [Federal Ministry of Education and Science]. (2015). *Weiterbildungsverhalten in Deutschland 2014* [Educational behavior in Germany 2014]. Berlin: BMBF.
- Eckert, T., & Schmidt, B. (2007). *Entwicklung der Weiterbildungsbeteiligung in Deutschland* [Development of participation in adult education in Germany]. http://www.ratswd.de/download/workingpapers2007/06_07.pdf. Accessed 6 July 2007.
- Federal Statistical Office. (2012). *Alter im Wandel – Ältere Menschen in Deutschland und der EU* [Changes in later life – Elderly people in Germany and in the EU]. Wiesbaden: destatis.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Amsterdam: Sense Publishers.
- Franz, J. (2009). *Intergenerationelles lernen ermöglichen. Orientierungen zum lernen der generationen in der erwachsenenbildung* [Facilitating intergenerational learning. Orientations towards learning of generations in adult education]. Bielefeld: WBV.
- Friebe, J., & Schmidt-Hertha, B. (2013). Activities and barriers to education for elderly people. *Journal of Contemporary Educational Studies*, 64(1), 10–27.
- Glaser, H. (1980). Es fehlt an 'Herausforderungen'. Kulturelles Lernen im Alter ('Challenges' are missing: Cultural learning in older age). *Das Parlament*, 30(37–38), 18.
- Herzberg, H. (2004). *Biographie und Lernhabitus. Eine studie im Rostocker Werftarbeitermilieu* [Biography and learning habitus: A study in the milieu of shipyard workers in Rostock]. Campus: Frankfurt/Main.
- Horn, H., & Ambos, I. (2013). *Weiterbildungsstatistik im verbund 2011 – Kompakt* (Joint adult education statistic 2011 – Compact). www.die-bonn.de/doks/2013-weiterbildungsstatistik-01.pdf. Accessed 10 July 2013.
- Kade, S. (2007). *Altern und Bildung. Eine Einführung* [Ageing and education. An introduction]. Bielefeld: Bertelsmann.
- Kolland, F. (2006). Bildungsangebote für ältere Menschen [Educational offers for older people]. *Bildungsforschung*. <http://www.bildungsforschung.org/index.php/bildungsforschung/article/view/37>. Accessed 28 Nov 2013.
- Levy, B. R. (1996). Improving memory in old age through implicit self-stereotyping. *Journal of Personality and Social Psychology*, 71(6), 1092–1107.
- Mannheim, K. (1928). Das Problem der Generationen [The problem of generations]. *Kölnner Vierteljahreshefte für Soziologie*, 7, 157–185 (Heft 2): 309–330 (Heft 3).
- Olbertz, J., & Prager, A. (2000). Altenbildung in Ostdeutschland vor und nach der Wende [Education for older people in East Germany before and after the peaceful revolution]. In S. Becker, L. Veelken, & K. P. Wallraven (Eds.), *Handbuch Altenbildung. Theorien und Konzepte für Gegenwart und Zukunft* (pp. 125–140). Opladen: Leske and Budrich.
- Schiersmann, C. (2006). *Profile Lebenslangen Lernens. Weiterbildungserfahrungen und Lernbereitschaft der Erwerbsbevölkerung* [Profiles of lifelong learning: Experiences in adult education and readiness to learn in the labour force]. Bielefeld: Bertelsmann.
- Schmidt, B. (2009). *Weiterbildung und informelles Lernen älterer Arbeitnehmer: Bildungsverhalten, Bildungsinteressen, Bildungsmotive* [Continuing education and informal learning of older workers: Educational behaviour, educational interests, educational motives]. Wiesbaden: VS-Verlag.
- Schmidt, B., & Tippelt, R. (2009). Bildung Älterer und intergeneratives Lernen [Education of older persons and intergenerational learning]. *Zeitschrift für Pädagogik*, 55(1), 74–90.
- Schnücker, E. (2000). Akademien [Academies]. In S. Becker, L. Veelken, & K. P. Wallraven (Eds.), *Handbuch Altenbildung. Theorien und Konzepte für Gegenwart und Zukunft* [Theories and concepts for present and future] (pp. 191–193). Opladen: Leske and Budrich.
- Stadelhofer, C. (2000). "Forschendes Lernen" im dritten Lebensalter ('Learning by research' in third age). In S. Becker, L. Veelken, & K. P. Wallraven (Eds.), *Handbuch Altenbildung. Theorien und Konzepte für Gegenwart und Zukunft* [Theories and concepts for the present and the future] (pp. 304–310). Opladen: Leske & Budrich.

- Strobel, C., Schmidt-Hertha, B., & Gnahn, D. (2011). Bildungsbiografische und soziale Bedingungen des Lernens in der Nacherwerbsphase [Educational biography and social conditions of learning in the phase of life after employment]. *Magazin erwachsenenbildung.at*. <http://www.erwachsenenbildung.at/magazin/11-13/meb11-13.pdf>. Accessed 3 Oct 2014.
- Tews, H. P. (1993). Neue und alte Aspekte des Strukturwandels des Alters [New and old aspects of structural change in later life]. In G. Naegele, & H. P. Tews (Eds.), *Lebenslagen im Strukturwandel des Alters. Alternde Gesellschaft – Folgen für die Politik*, [Situations in the structural change of age. Ageing Society – Implications for policy] (pp. 15–42). Opladen: Leske & Budrich.
- Theisen, C., Schmidt, B., & Tippelt, R. (2009). Weiterbildungserfahrungen [Adult education experiences]. In R. Tippelt, B. Schmidt, S. Schnurr, S. Sinner, & C. Theisen (Eds.), *Bildung Älterer. Chancen im demographischen Wandel* [Education for the elderly: Opportunities in demographic change] (pp. 46–70). Bielefeld: Bertelsmann.
- Thomae, H., & Lehr, U. (Eds.) (1968). *Altern – Probleme und Tatsachen* [Ageing – problems and facts]. Frankfurt/Main: Akademische Verlagsgesellschaft.
- Tippelt, R. (2004). Institutionen der Weiterbildung [Institutions in adult education]. In H.-H. Krüger, & C. Grunert (Eds.), *Wörterbuch für Erziehungswissenschaften* [Dictionary of Education] (pp. 129–134). Wiesbaden: Verlag.
- Tippelt, R., Schmidt, B., & Kuwan, H. (2009a). Bildungsteilnahme [Participation in education]. In R. Tippelt, B. Schmidt, S. Schnurr, S. Sinner, & C. Theisen (Eds.), *Bildung Älterer. Chancen im demographischen Wandel* [Education for the elderly: Opportunities in demographic change] (pp. 107–123). Bielefeld: Bertelsmann.
- Tippelt, R., Schmidt, B., Schnurr, S., Sinner, S., & Theisen, C. (Eds.). (2009b). *Bildung Älterer – Chancen im demografischen Wandel* (Education for the elderly – Opportunities in demographic change). Bielefeld: Bertelsmann.
- Veelken, L. (2000). Geschichte (History). In S. Becker, L. Veelken, & K. P. Wallraven (Eds.), *Handbuch Altenbildung. Theorien und Konzepte für Gegenwart und Zukunft* [Theories and concepts for the present and the future] (pp. 184–186). Opladen: Leske & Budrich.
- Wildemeersch, D., & Salling Olesen, H. (2012). Editorial: The effects of policies for the education and learning of adults – From ‘adult education’ to ‘lifelong learning’, from ‘emancipation’ to ‘empowerment’. *European Journal for Research on the Education and Learning of Adults*, 3(2), 97–101.
- Winter, J. (1980). *Internationales Seminar zu Fragen der Vorbereitung auf das Alter* [International seminar on questions about the preparation for later life]. *Hessische Blätter für Volksbildung*, 30(3), 275–277.
- Zeman, P. (2000). Lernen in Selbsthilfeorganisationen [Learning in self-help organisations]. In S. Becker, L. Veelken, & K. P. Wallraven (Eds.), *Handbuch Altenbildung. Theorien und Konzepte für Gegenwart und Zukunft* (pp. 202–207). Opladen: Leske & Budrich.

Chapter 13

Ghana

Michael Tagoe

Dramatic demographic change is occurring globally, but more in developed countries. In developed countries there is an expansive growth in the ageing population due to improvement in life expectancy, public health and healthy lifestyles. Due to these factors, it is estimated that “in less than 10 years, older people will outnumber children for the first time in history” (Withnall, 2012, cited in Merriam and Kee 2014, p. 2). The decline in fertility, increase in longevity and improved macroeconomic and institutional conditions, such as the incentives created by pension systems in developed countries, have also made retirement more attractive for an ageing population who perceive it as an opportunity to explore areas that one could not because of working life.

In sub-Saharan Africa, although the ageing population is growing, it not as dramatic as it is in developed countries. In spite of the slow growth in numbers of older adults, there have been calls for more awareness about their needs and welfare on the African continent (United Nations 2002; Tawiah 2011). Older adults in Africa face several challenges because of the poverty which many individual countries are experiencing. In Ghana, older adults suffer from stroke, diabetes, hypertension, mental problems, increased risks of disability and loneliness. They also suffer from the absence of effective social protection policies such as a good pension and they experience dwindling family support. What has happened within the field of gerontology over the years in Ghana is that much attention by researchers has focused on these challenges (Apt 2000; Tawiah 2011).

Whilst it is important that studies focus on these challenges, recently there has been a gradual shift in gerontology towards the “gains” of ageing. There is evidence to show that most older adults are not weak and feeble when they retire from work. Some remain active contributors to their family, institutions, and society (World

M. Tagoe (✉)

School of Continuing and Distance Education, University of Ghana, Legon, Ghana
e-mail: mtagoe@ug.edu.gh

Health Organization [WHO] 2002) when in retirement. Unfortunately, active ageing remains an under-researched area in Africa and Ghana. In Ghana, there are individuals, particularly teachers, who have retired from active service but are still engaged on contract because of the skills and competencies they could pass on to students, and their peers as well as the influence they exert on society. New learning by older adults occurs amongst friends, work associates, neighbours and family members.

Although formal sites for lifelong learning for older adults have received much attention, non-formal and informal learning sites have remained neglected (Merriam and Kee 2014). In Ghana, little research has been done on “bridge occupations” (an employment transition from full employment to full retirement) and the informal learning that takes place among older adults. The purpose of the empirical study outlined later in this chapter is to examine the informal learning that goes on among older adults who are in a bridge occupation.

13.1 Older Adults, Ageing and Lifelong Learning

Ageing has been defined as “the progressive loss of function accompanied by decreasing fertility and increasing mortality that occurs with advancing age” (Adams and White 2004, p. 331). Ageing allows us to classify people according to age cohorts. One of the categorizations is older adults. However, a definition of ‘older adults’ is fraught with difficulties (Findsen and Formosa 2011). This is so because there are different definitions of older adults at both international and local levels. Most developed countries have accepted the chronological age of 65 years as a definition of ‘elderly’ or older persons (WHO, 2000, cited in Kowal and Peachey 2001). However, in Africa, although the chronological age of 60 years has been accepted by many countries as the official age of retirement, socio-cultural ageing, where people are not seen as just terminating work but have social and cultural functions to play in society, remains deeply relevant.

In spite of social and cultural influences on ageing in Africa, it is becoming increasingly clear that the chronological age of 60 or 65 years, considered as the retirement age, is becoming the beginning of old age in Africa. Nevertheless, the reliance on chronological age gives the impression that all adults who reach the age of retirement are incapable of continuing to work. To address this challenge, this study adopts the following working definition of older adults: “people, whatever their chronological age, who are post-work and post-family, in the sense that they are less or no longer involved in an occupational career or with the major responsibilities for raising a family” (Findsen and Formosa 2011, p. 11). This definition is of significance because it informs us that as we age we scale down our career expectations accompanied by retirement with some pension and health benefits, sometimes alongside part-time work to keep active and motivated (Findsen and Formosa 2011). “Active ageing” usually means growing old in good health and as a full member of society, feeling more fulfilled in work, more independent in daily life and more involved as citizens (WHO 2002; Walker and Maltby 2012).

Purdie and Boulton-Lewis (2003) have noted that the ability of older adults to remain physically, mentally and socially active is dependent, in part, upon continuous learning. Boulton-Lewis (2010) has observed that formal or informal learning may keep the brains of older adults active by boosting intellectual power. Learning may also protect against cognitive decline (Purdie and Boulton-Lewis 2003). In the context of active ageing, lifelong learning is important for skills acquisition and updating, socio-cultural participation, individual well-being, intergenerational solidarity and social inclusion and that is why the WHO has included lifelong learning as one of the critical pillars of active ageing which may include taking up a new hobby, acquiring a new skill or experiencing a new activity (Kalache 2013).

Lifelong learning could be described 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” (European Commission [EC] cited in Formosa 2012, p. 388). Ideally, these learning opportunities are “accessible to all, regardless of age and status” (Nesbitt 2007, p. 36). Three main types of learning are associated with lifelong learning. These are formal, non-formal and informal learning. In discussion of types of learning, one area that has much relevance to older adults but has remained unrecognised is informal learning (Merriam and Kee 2014). Informal learning is “learning that is predominantly unstructured, experiential, and noninstitutional” and “which takes place as people go about their daily activities at work or in other spheres of life” (Marsick and Volpe 1999, p. 4). Marsick and Watkins (2001) have noted that informal and incidental learning takes place wherever people have the need, motivation and opportunity for learning.

13.2 National Policy on Ageing in Ghana

As we look beyond retirement and bridge employment and focus more on ‘active ageing’ in the twenty-first century, there is the need to examine critically the efforts of government in incorporating the needs of older adults into national policy documents. Whilst Ghana’s ageing population has been growing since the 1960s, from 4.9 % in 1960 to 7.2 % in 2000 (with the number increasing from 0.3 million to 1.4 million over the same period) (Mba 2010), very little attention has been paid to the ageing in national policies until the 1990s, when Article 37 (2) (b) of the 1992 Republican Constitution of Ghana called for “the protection and promotion of all other basic human rights of the disabled, the aged, children and other vulnerable groups in development processes.” Article 37 (6) (b) also states that the State shall “provide social assistance to the aged such as will enable them to maintain a decent standard of living” (Republic of Ghana 1992).

Ghana’s policy on ageing can be traced to 1994, when in its revised Ghana Population Policy noted that “Policies will be adopted to ensure that adequate upkeep and full integration of the aged and persons with disabilities into the society... Appropriate policy environment will also be created to enable the aged feel secure

and useful in society” (Republic of Ghana 1994, p. 39). In 1997, a National Committee on Ageing was formed by the government to draft a National Policy on Ageing for the country (Republic of Ghana 2007). In 2002, the draft policy was submitted to Cabinet for approval and ratification by Parliament. In the same year, Ghana participated in the Second World Assembly on Ageing and adopted the Madrid International Plan of Action (MIPAA). Unfortunately, the draft policy could not get the approval of Parliament since it had no implementation action plan and was not considered sufficiently participatory (Ministry of Employment and Social Welfare 2010).

In 2003, the Government of Ghana began to incorporate the issues of ageing in national development policy documents. Under the *Ghana Poverty Reduction Strategy: Agenda for Growth and Prosperity (GPRS I, 2003–2005)*, a section was devoted to vulnerability and the excluded which incorporated children in difficult circumstances, rural agricultural producers, disadvantaged women, people living with HIV and AIDS, the elderly, and the disabled (Republic of Ghana 2003). In 2005, a successor to the GPRS (2003–2005), the *Growth and Poverty Reduction Strategy (GPRS II, 2006–2009)* was more emphatic in terms of government plans towards the vulnerable and the excluded. Under *Social Policy Framework for Mainstreaming the Vulnerable and Excluded in Human Resource Development*, the policy document noted that the vulnerable in Ghana do not reach their full potential because of social exclusion.

In order to address these challenges, some attempt was made to harmonise the various social policies (Early Childhood Care and Development (ECD) Policy, Gender and Children’s Policy, Education Reform Policy, Health Reform Policy, Draft National Disability Policy, National Population Policy, Draft Youth Policy, and Draft National Ageing Policy) into a comprehensive Social Policy Framework to address risks facing vulnerable groups as well as protect their rights and enhance their contribution to national development (Republic of Ghana 2005). Indeed, the National Social Protection Strategy developed in 2006 and the introduction of the Livelihood Employment Against Poverty (LEAP) and Social Grants Scheme, that provided targeted vulnerable groups with cash transfer, were some of the strategies to address the challenges of older people who were above 65 years (Republic of Ghana 2007).

In 2008, a more concerted effort to ratify the draft policy on ageing resulted in the approval of the National Ageing Policy in October 2010 under the theme “Ageing with Security and Dignity” (Ministry of Employment and Social Welfare 2010). The overarching goal of the national ageing policy is to achieve the overall social, economic and cultural re-integration of older persons into mainstream society, to enable them as far as practicable to participate fully in the national development process (Ministry of Employment and Social Welfare 2010). Since the policy has been in existence for a limited number of years, it is very difficult to assess how far Government has been implementing the policies and the Implementation Plan of Action. In spite of this shortcoming, older persons in Ghana have for many years been making valuable contributions to the economy and to society beyond retirement.

13.3 Older Adults and Returning to Work in Ghana

Active ageing is about people being physically active, and continuing their participation in social, economic, cultural, spiritual and civic affairs in older age (Boulton-Lewis, Buys, and Lovie-Kitchin 2006). Although retirement from work has been used as a gateway for individuals to leave the workforce permanently, categorization for older adults in many countries, both developed and developing, show that older adults engage in some transitional employment between their career employment and complete labour force withdrawal (Feldman and Beehr 2011). What is usually referred to as “bridge employment” is defined as “transition into some part-time, self-employment or temporary work after full time employment ends and permanent retirement begins” (Feldman, 1994, p. 286, cited in Weckerle and Schultz 1999). Bridge employment includes both part-time and full-time work that may or may not be similar to the work performed prior to retirement, in the same organization or in a different organization (Gobeski and Beehr 2009) and can serve “several important functions for individuals, organizations, and society” (Adams and Rau 2004, p. 720).

Several writers have identified several benefits for older adults as they engage in bridge employment. Bridge employment allows older adults to make a smoother transition from work to retirement (Adams and Rau 2004; Feldman and Beehr 2011). Wang (2007 cited in Dingemans and Henkens 2013) has demonstrated that bridge employees are better able to maintain their pre-retirement levels of well-being during the retirement transition compared with retirees without bridge jobs. Using continuity theory, Kim and Feldman (2000) and Gobeski and Beehr (2009) argue that post-retirement employment allows many aspects of lives of older adults to remain the same, that is, they are able to maintain daily routines. Gobeski and Beehr (2009) argue that older workers’ preferences and activities after retirement are similar to their preferences and activities before retirement. Kim and Feldman (2000) have noted that individuals through bridge employment are able to sustain contact with co-workers and colleagues. Bridge jobs also enhance the labour force for employers by making sure that shortages which could arise from absence of younger people are filled by older adults (Weckerle and Schultz 1999). They also become an important source of income which reduces poverty as well as reliance on social security and other public and/or private retirement funding sources (Adam and Rau 2004).

In Ghana, although Article 199 (1) of the 1992 Constitution stipulates that one may retire from the public service on attaining the age of 60 years, there is evidence that many people in certain occupations do not withdraw from active work. In order to encourage active ageing and the full utilization of the potential and expertise of older persons in the public sector, particularly health and education, there has been a general policy to remove some barriers to flexible, full-time and part time employment in critical sectors. Consequently, contracts were awarded to some retired teachers who are still active to fill vacancies in schools which lack teachers (Republic of Ghana 2007). In addition, health and

educational professionals, especially tertiary education teachers, doctors and nurses, are engaged to continue their services for a considerable period of time after retirement on a contract basis. The rich expertise and experience of these professionals are utilized in the training and capacity building of younger workers in these sectors (Republic of Ghana 2007).

13.4 A Case Study of Older Adults in a Bridge Occupation in Ghana

13.4.1 Method

A qualitative case study was selected for this study because it offers an intensive holistic description of the context in which informal learning occurs among older adults working in a specific working environment (Merriam 2000). The sample consisted of seven Ghanaian adults older than 60 years. The minimum age of 60 years was adopted as the minimum criterion for inclusion because retirement age in Ghana is 60 years. A snowball sampling process was used to select respondents for the study. This approach allowed me (the researcher) to locate respondents through his/her professional and academic networks (Merriam and Mohamad 2000). All the respondents described their health as “good”.

In terms of data collection, an intensive interview was conducted with the seven respondents. An intensive interview allows an in-depth exploration of a particular topic with those who have had the relevant experiences (Charmaraz 2006). The interview schedule consisted of open-ended questions regarding learning activities of this stage of life (Merriam and Mohamad 2000; Charmaraz 2006). The interviews focused on the following questions: (i) Tell me something about yourself; (2) What new things have you learned since you retired? (3) How did you learn these new things? (4) How much of the learning was informal? These questions aimed to explore what informal learning is, how it is constructed by older adults, and its effects on their professional identities (Garrick 1998). The intensive interviews which were audio-taped took between 30 to 45 min. The interviews were later transcribed; data were analysed by using the constant comparative method (Glaser and Strauss 1967). Codes were then assigned to recurrent themes where patterns of experiences were listed using direct quotes or paraphrasing ideas of informal learning (Merriam and Mohamad 2000).

Descriptors of three of the seven in the sample are as follows:

- Case 1 who spent almost 38 years as a teacher and rose to the rank of director of education is now working in a private school.
- Case 2 who retired from active service last year as a teacher is now working with a private school as an administrator.
- Case 3 who retired eight (8) years from the University of Ghana retired eight (8) years ago now works as a consultant developing training tools for African journalists.

13.5 Findings

Three themes capture the nature of informal learning for the older adults in this study. First, learning is related to the participant's work life. Second, the learning that took place was informal. Third, learning was driven by a new environment which was different from what they were used to.

13.5.1 New Work Is a Continuation of the participant's Work Life

The study found that some of the respondents were recruited into jobs they had done for many years previously.

Case 1 spent almost 38 years as a teacher. He has joined a private school. His position in the school is to advise and supervise teaching and learning in the classroom, and assess teachers performances.

Case 2 is teacher and has been doing that his whole life time. He has taught at various levels of the educational system. After retirement, he joined a private school where he is into administration.

Case 3 began her career as broadcaster with Ghana's premier radio station. Later she joined the University of Ghana as a lecturer and worked for 30 years in the area of adult education. She still teaches at the university and works as a consultant developing training tools for African journalists to help them improve their knowledge on education in Africa.

From each of the above descriptors of the working lives of three respondents, it can readily be seen that the public servants, two teachers and an official, developed pathways that extended their previous areas of expertise. While no longer employed in the civil service, their new roles in a bridge occupation have enabled them to sustain their work orientations and continue their professional tracks.

13.5.2 Learning Is Informal and Experiential

The study found that participants indeed continued to learn beyond retirement. The learning that occurred was not only informal but was experiential as well as being embedded in the respondents' everyday lives (Merriam and Mohamad 2000). James (Case 1) who retired as a Director of Education identified three major ways that he has learned and continues to learn informally from his colleague teachers at the school.

My interaction with the teacher after his/her presentation in the classroom and the evaluation that takes place has taught me new things, new ways, new methods of doing things. I

have also learned the skill of affability. Most of our things depend on relationships, how you interact with the students, how you interact with the teachers to find out their problems. And by so doing you yourself you learn better. Another area that I have learned greatly is the multiple roles that I am playing without any formal training as a supervisor, trainer, teacher, counsellor.

According to Joseph (case 2), one of the areas that he has learned is that of developing good relationships with colleagues vertically and horizontally. Working in an environment where he has been issuing communiqués and moving to a new environment where he is working with senior and junior colleagues has taught him how to relate in a different way with colleagues after retirement. Another area where informal learning has occurred is when he sits in the classroom to supervise the teachers.

My area was English. So everything I did was English, English, English. So now am looking at history, home economics and Religion and Moral Studies (RMS). When I go to supervise the teachers in these subjects, I sometimes take notes, not notes on how they teach, but my own notes on the subject matter because I am learning. RME I took it for granted and thought that once I read the bible and go to church, then I am religious but no, there is more to it than meets the eye so I am learning a lot from my colleagues that I am working with.

As people age, they learn how to be patient. This is something that comes about through interaction with different parents and colleagues and learning from experience. Case 3, who is 78 years, sees this a critical lesson as people age or mature on the job. According to him:

We've learnt a lot of things even from the children, the teachers we interact with. You see we've met a lot of different teachers, different parents and when you a parent comes here so angry, you know the way you will handle him. As you grow older, you have patience to listen to people and explain issues better to parents.

13.5.3 Learning Driven by a new Environment

The study found that respondents had to learn new things based on the new environment that they found themselves. One of the things that had learned informally was the use of technology.

One of the things that I have forced myself to learn after retirement is the use of the computer. Initially, I was so scared of using the computer. I have realised that without the computer I cannot operate efficiently at the international scene. So I had to rely on my son who is an IT specialist to help whenever I had difficulty. Gradually, I can do my emails, send letters, and attachments. The internet has forced me to learn informally and I am happy about it (Case 3).

13.6 Discussion

The study attempted to find out how older adults who are in bridge occupation learn informally. Retirement has always been associated with cessation of work by older adults and also the post-retirement period for many older adults marks a period of withdrawal and possible onslaught of poor health from debilitating diseases. The study found that there is a period critical to older adults which could be described as an active period before the period when they completely withdraw from work. A bridge occupation was seen by the older adults as a continuation of their professional work. The study found that older adults in a bridge occupation in Ghana continue to learn informally from their peers and their children. One of the significant findings of the study was that the older adults did not see Information and Communication Technology (ICT) as a threat to their new roles. Rather, they were willing to learn the use of computers to facilitate their work.

In the study seven older adults who have retired from active service but are still engaged in some type of work were interviewed. I examined how these adults learn in their new work environment. Although the findings of the study could not be generalised because of its qualitative nature and the small sample size, there is enough evidence to suggest that informal learning was very important in the lives of these older adults. One of the contributions of the study is the realisation that older adults can have a huge contribution to make towards socio-economic development on retirement in Ghana and that more research needs to be conducted to understand the relevance of bridge occupation to national development.

References

- Adams, G., & Rau, B. (2004). Job seeking among retirees seeking bridge employment. *Personnel Psychology, 57*, 719–744.
- Adams, J., & White, M. (2004). Biological ageing: A fundamental, biological link between socio-economic status and health. *European Journal of Public Health, 14*, 331–334.
- Apt, N. (2000). *Rapid urbanization and living arrangements of older adults in Africa*. Paper prepared for the technical meeting on Population Ageing and Living Arrangements of Older Persons: Critical Issues and Policy Responses. Department of Economic and Social Affairs, United Nations Secretariat, New York.
- Boulton-Lewis, G. (2010). Education and learning for the elderly: Why, how, what. *Educational Gerontology, 36*, 213–228.
- Boulton-Lewis, G., Buys, L., & Lovie-Kitchin, J. (2006). Learning and active aging. *Educational Gerontology, 32*(4), 271–282.
- Charmaraz, K. (2006). *Constructing grounded theory: A practical guide through qualitative analysis*. Thousand Oaks: Sage Publications.
- Dingemans, E., & Henkens, K. (2013). Involuntary retirement, bridge employment, and satisfaction with life: A longitudinal investigation. *Journal of Organisational Behaviour*. Retrieved on April 21, 2013, from <http://www.wileyonlinelibrary.com>. doi:10.1002/job.1914

- Feldman, D., & Beehr, T. (2011). A three-phase model of retirement decision-making. *American Psychologist*, *66*(3), 193–203.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Rotterdam: Sense Publishers.
- Formosa, M. (2012). European Union policy on older adult learning: A critical commentary. *Journal of Aging and Social Policy*, *24*(4), 384–399.
- Garrick, J. (1998). Informal learning in corporate workplace. *Human Resource Development Quarterly*, *9*(2), 129–144.
- Glaser, B., & Strauss, A. (1967). *The discovery of grounded theory: Strategies for qualitative research*. New York: Adline Publishers.
- Gobeski, K., & Beehr, T. (2009). How retirees work: Predictors of different types of bridge employment. *Journal of Organisational Behaviour*, *30*, 401–425.
- Kalache, A. (2013). *The longevity revolution: Creating a society for all ages*. Adelaide thinker in residence 2012–2013. Adelaide: Government of South Australia.
- Kim, S., & Feldman, D. (2000). Working in retirement: The antecedents of bridge employment and its consequences for quality of life in retirement. *Academy of Management Journal*, *43*(6), 1195–1210.
- Kowal, P., & Peachey, K. (2001). *Indicators for the minimum data set project on ageing: A critical review in sub-Saharan Africa*. A report of the follow-up meeting to the 2000 Harare MDS Workshop, 21–22 June, United Republic of Tanzania, Dar-es-Salaam.
- Marsick, V., & Volpe, M. (1999). The nature and need for informal learning. *Advances in Developing Human Resources*, *1*(1), 1–10.
- Marsick, V., & Watkins, K. (2001, Spring). Informal and incidental learning. *New Directions for Adult and Continuing Education* *89*, 25–34.
- Mba, C. (2010). Population ageing in Ghana: Research gaps and the way forward. *Journal of Ageing Research 2010*, Article ID 672157, 8 pages.
- Merriam, S. (2000). *Qualitative research and case study applications in education*. San Francisco: Jossey-Bass.
- Merriam, S., & Kee, Y. (2014). Promoting community well-being: The case for lifelong learning for older adults. *Adult Education Quarterly*, *64*, 128–144.
- Merriam, S., & Mohamad, M. (2000). How cultural values shape learning in older adulthood: The case of Malaysia. *Adult Education Quarterly*, *51*(1), 45–63.
- Ministry of Employment and Social Welfare. (2010). *National ageing policy: Ageing with security and dignity*. Accra: Government of Ghana.
- Nesbit, T. (2007). Lifelong learning in institutions of higher education. *Canadian Active Journal of University Continuing Education*, *33*(1), 35–60.
- Purdie, N., & Boulton-Lewis, G. (2003). The learning needs of older adults. *Educational Gerontology*, *29*(2), 129–149.
- Republic of Ghana. (1992). *1992 constitution of the Republic of Ghana*. Accra: Government of Ghana.
- Republic of Ghana. (1994). *National population policy* (Rev. ed.). Accra: National Population Council.
- Republic of Ghana. (2003). *Ghana poverty reduction strategy 2003–2005: An agenda for growth and prosperity*. Accra: National Development Planning Commission (NDPC).
- Republic of Ghana. (2005). *Growth and poverty reduction strategy (GPRS II) (2006–2009)*. Accra: National Development Planning Commission.
- Republic of Ghana. (2007). *Ghana country report on the implementation of the Madrid international plan of action on ageing (MIPAA)*. Accra: Ghana.
- Tawiah, E. (2011). Population ageing in Ghana: A profile and emerging issues. *African Population Studies*, *25*(2), 623–645.
- United Nations. (2002). *Report of the second world assembly on ageing*. Madrid, 8–12 April 2002, New York.

- Walker, A., & Maltby, T. (2012). Active ageing: A strategic policy solution to demographic ageing in the European union. *International Journal of Social Welfare*, 21, S117–S130. doi:10.1111/j.1468-2397.2012.00871.x.
- Weckerle, J., & Schultz, K. (1999). Influences on the bridge employment decision among older USA workers. *Journal of Occupational and Organisational Psychology*, 72, 317–329.
- World Health Organisation [WHO]. (2002, April). *Active ageing: A policy framework*. A contribution to the Second World United Nations World Assembly on Ageing, Madrid/Geneva.

Chapter 14

Greece and Cyprus

George K. Zarifis

14.1 Introduction

14.1.1 *The Brunt of Socio-Economic Conditions*

The current economic crisis has put at risk the European social model of social care and solidarity. This is nowhere more evident in Europe today than in Greece and Cyprus, the two southern European countries that have very strong cultural and political bonds, and have also been severely affected by high unemployment and the eradication of their social welfare systems. The effects of the crisis are not however evenly distributed among social groups in the two countries. Those mostly affected are the unemployed (mostly young people 18–24) as well as older people (aged 60-plus). According to the country report *An ageing Europe: Challenges of the European senior service sector* (Szewbs et al. 2008), Greece is characterised by high poverty rates among older people – in particular among older single women, very old persons, and ethnic minorities.

However, the specificity of poverty and social exclusion in old age, as described in the relevant literature for both countries, is often misread in the public and political discourse. The report *Older people also suffer because of the crisis* (Age Platform Europe 2012) argues that national strategies to exit from the socio-economic crisis have been so far overwhelmingly driven by public finance austerity measures, often to the detriment of social objectives. This is more evident in Greece which also presents an acute demographic problem. According to data from the Hellenic Statistical Authority (ELSTAT) (2010), in 2006 as much as 16.6 % of men and 20.4 % of women were older than 65 years. Financial difficulties push older

G.K. Zarifis (✉)

Department of Education, School of Philosophy and Education, Faculty of Philosophy,
Aristotle University of Thessaloniki, Thessaloniki, Greece

e-mail: gzarifis@auth.gr

Table 14.1 Percentage of unemployment for older adults (50-74 years) in Greece and Cyprus

TIME	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
GEO													
European Union (28 countries)	:	:	6.3	6.4	6.8	6.4	6.0	5.3	5.0	6.1	6.6	6.6	7.1
Greece	4.0	4.1	4.1	3.7	4.7	4.5	3.9	3.6	3.6	5.1	7.0	9.8	15.3
Cyprus	3.2	4.4	3.1	3.5	4.2	3.4	3.4	3.0	2.6	3.9 ^(b)	3.9	4.3	8.6

Source: Eurostat (European Union Statistics on Income and Living Conditions 2012). Data accessed: 14.08.13

^(b)break in time series

people to distress and depression and, in most extreme cases, to suicide. Relevant data from ELSTAT (2010) also demonstrated that in 2010, 46 % of calls were from people aged 50 years and over, with an estimated 25–30 % increase in people seeking help from psychiatric services during the crisis. Suicide rates for men are consistently very much higher than for women and cause specific mortality rates for suicide by age group are highest for persons aged 80-plus, for both men and women. In Cyprus, the experiences of older people arise mainly from direct reductions in their financial resources, cuts in essential services due to the resulting austerity measures, and indirect consequences from strikes and negative reactions of public service workers and other service providers in protest against the measures. Whilst some of the problems are more long-standing, all have been exacerbated during the crisis and more importantly, some improving trends – that is, in poverty rates and health life expectancy – are recently being reversed. Furthermore, according to Eurostat (2012) unemployment for men and women between 50 and 74 years of age has increased considerably in both countries since 2000 (Table 14.1).

As the states in Cyprus and Greece are short of solutions in the welfare front, philanthropic solutions are being increasingly used for basic problems of survival, but also for filling the gaps in basic social care and learning provision for older persons. Many non-governmental organisations and municipalities provide non-formal education activities for older adults that are largely focusing on health issues. The situation that is described above reflects that of 30 years ago, when many older people had no effective health insurance or access to free primary health care, basic and/or continuing adult education, with these numbers having been gradually eliminated until the present time, when the numbers are again rising.

14.1.2 Care-Taking and Learning in Later Life

Educational gerontology is not exclusively related to educational provision to older adults, but also spans its attention to the field of caring for older adults and their welfare through provision of learning opportunities. In order to explore the factors that affect educational gerontology in Greece and Cyprus, one effectively needs to

consider the ones that relate to care-taking since learning provision and educational opportunities for older adults in both countries are fundamentally part of the broader framework for social care for this age group (in essence, men and women aged 50-plus with a social, physical or economic disadvantage). This does not necessarily contradict the concept of educational gerontology as such. It does, however, raise some issues on who takes the social responsibility for the provision of learning and educational opportunities as part of the broader social care arrangement in Greece and Cyprus.

A closer look at the existing framework on social care and learning initiatives for older adults in Greece and Cyprus reveals that care for older persons in particular has been characterised as a 'family affair'. Public provision still remains limited and the family continues to carry the main caring responsibilities. This essentially operates as a safety net for those older adults in disadvantaged positions but occasionally – as will be elaborated upon in subsequent parts – it also operates as a barrier for older adults to engage themselves in formal and non-formal learning activities outside the family environment. The inability to leave the comfort-zone that the family provides to older adults needs to be addressed as it contributes in generating a cultural discrepancy among people in this age group who gradually become totally dependent on their family members. In this framework women in particular bear a disproportionate burden in caring for older family members as they provide the bulk of informal care within the family. Based on ECHP data for the year 1996, Bettio and Plantenga (2004) found that the gender gap in care provision in Greece is particularly high (82.7 %). The study on caring as an engendered process by Stratigaki (2006) produces similar results. Indeed, the results of a recent study on family careers of frail older persons in Greece are also highly indicative since women represent as much as 80.9 % of family cares (Triantafyllou et al. 2006).

There are, however, a number of services that combine both the aspect of social and health care as well as learning provision that have been in place for decades and still in operation, without showing any signs of readjustment to current social needs. One such service is the Open Care Community Centres (KAPI) in Greece. According to Hoff (2008), KAPI constitute community centres focusing on protecting but also stimulating older people with social and learning activities. KAPI were initially an idea put forward by some non-governmental organisations – until the Greek government decided that it was worthwhile funding it. Since then, KAPI have emerged all over the country. These centres combine the socialising aspect with primary health care facilities, as well as other professional support in the broad field of social services (see Sissouras et al. 2002). Some KAPI operate as social clubs, they have meeting rooms, they have social activities and employ social workers who run these activities. They also provide primary health care, and some of them employ physiotherapists. Usually, older people are involved in running the organisation as members of the management committee. Education in KAPI is offered mostly in the form of individualised lectures or a chain of lectures upon specific issues, rather than workshops or seminars. Some KAPI co-operate with Universities, the Hellenic Centre for Mental Health and Research, and local medical associations to provide learning to older adults. Seniors who visit or participate in KAPI are not usually of

a high educational level. Experience shows that they are nevertheless attracted to educational projects provided these are related to their interests. So far not all of these structures managed to find appropriate funding, unlike the home-care system for people who could not look properly after themselves that was largely subsidised from the European Social Fund, an action that prioritized home-care initiatives by weakening the role of KAPI (Karl and Friedrich 2007). The state does provide however basic adult education and training to a number of adult education structures (for example, the Prefectural Centres for Popular Education) open to older adults, but unfortunately no priority or focus is given to the education of older persons. Another local structure that developed more recently is the 'Friendship Clubs' that aim to promote interest for life, entertainment, and educational activities to people aged 60-plus, to keep them active and enthusiastic about life.

According to Hoff (2008), an important source of relatively new services for older people are provided by a number of non-governmental organisations, sometimes also by municipalities, often attracting people from an entire region who live very isolated otherwise. This is particularly evident in Cyprus where non-dependent older adults who cannot live under the same roof with their children, spend much of their day in day-care centres run by non-governmental organisations. These centres provide the only opportunity for the socialisation of older persons. Seniors can spend their day there and have their meals in the company of others in a similar situation. Moreover, some day-care centres established links with local doctors or local health services. In general, there is a level of co-operation between the government and voluntary organisations for older persons for addressing and dealing with poverty among older persons. In comparison to Greece as to other European countries, Cyprus appears to have a negative record for poverty in later life which is among the highest in Europe. According to European Union Statistics on Income and Living Conditions (EU-SILC) 46.3 % of persons aged 65-plus lived below the poverty line in 2008. Admittedly, this figure stands far above the European Union (EU) average (18.9 % in 2008). The very high poverty among older persons in Cyprus is surprising and perhaps counterintuitive for several reasons (Koutsampelas 2012). The economy of Cyprus has performed very well during the last decade, a fact reflected not only in high rates of economic growth, but also in the attractive conditions of the labour market. It is normally expected of prosperous societies to afford adequate economic sources for the well-being of older persons. Furthermore, the overall inequality and poverty in the country are relatively low (even below EU average). So, why is the risk of poverty so asymmetrically distributed across age groups? Notably, the recent political debate is focused on the issue of the sustainability of the pension system. Since the income of older persons stems at a large extent from pensions, it comes as a natural that the structure of the pension system affects poverty in the old-age. This is also true for Greece. Koutsampelas (2012) stresses that the high poverty rates in later life, as well as the low income position of older persons vis-à-vis the rest of the population, are at a certain extent the outcome of pensions income inadequacy. Furthermore, following an investigation of the gender dimension of poverty in later life, he concludes that on average women

in the EU are 7.3 percentage points more probable to experience poverty than males. In Cyprus the corresponding figure is 10.6 %, considerably above the EU average.

The above examination of the existing framework and initiatives, as well as the effects of budgetary restrictions in funding social care structures and increasing poverty among the older population in Greece and Cyprus, will be further elaborated in the next section of the chapter in order to explain the deficit in communicating learning opportunities to older adults, in developing sustainable policies that respond to their care and learning needs especially during the crisis, and particularly in facilitating this part of the adult population to access and participate to all types of learning activities in both countries.

14.1.3 Access to and Participation in Learning

During the past decades, a number of socio-economic developments, more or less common across Europe, have addressed significant challenges to the institutional and familial arrangements related to the provision of social care and learning to older adults. These developments have important implications for the so called 'mixed economy of social care' that characterise the whole system of social care provision in Greece as well as in Cyprus. This new type of social care, however, seems to ignore the immediate needs of older adults in disadvantage. Particularly those who live alone are illiterate and in need of basic education in order to access the system and benefit from it (Moukanou 2009). One may think that illiteracy is a concern that was solved a long time ago in contemporary European societies. The figures in the two countries however are compelling. The percentage of illiteracy in the entire Greek population according to ELSTAT (2010) refers almost exclusively to persons older than 60 years old and constitutes the 11.24 %. The latest reports from Eurostat (2013a, b) on European indicators reveal the need to raise literacy levels among senior adults (aged 65-plus) in the two countries. Low levels of literacy and numeracy among older people may become a problem given recent policy decisions on the extension of working age. There are no national targets at the moment to improve literacy for this group.

An immediate comment one can make by looking at this situation is that the educational level is a very crucial factor for the entire project of educating older adults (particularly the disadvantaged) in Greece and Cyprus especially for the attempt to bring about life-long learning in their midst. People with better levels of education are generally believed to be better prepared for old age. In addition to having better-paying jobs, better educated people tend to have fewer health problems, and are more likely to live with spouses. According to a report published by the European Centre for the Development of Vocational Training (CEDEFOP 2003) on citizens' views on lifelong learning, as much as 21 % of Greek citizens thought lifelong learning as being 'unimportant', even though it is more likely for lifelong learning to be viewed as a compensatory measure.

Table 14.2 Participation rates in education and training among older adults (50–74) in Greece and Cyprus (percentages)

TIME	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
GEO													
European Union (27 countries)	2.6 ^(e)	2.7 ^(e)	2.7	3.4 ^(b)	3.9	4.2	4.3	4.4	4.5	4.5	4.4	4.2	4.5
Greece	0.1 ^(u)	0.1 ^(u)	0.1 ^(u)	0.4 ^(b)	0.2	0.2	0.2	0.2	0.4	0.6	0.6	0.4	0.6
Cyprus	0.9 ^(u)	1.0	1.1	2.4 ^(b)	3.4	2.1 ^(b)	3.0	3.6	3.7	3.0	3.1	3.6	3.0

Source: Eurostat (European Union Statistics on Income and Living Conditions 2012). Data accessed: 26.06.13

^(b)break in time series

^(e)estimated

^(u)low reliability

The low levels of educational attainment and qualification amongst older persons reveal a huge *communication deficit* in building a clear strategy and a sustainable approach for the role of learning in later life. The authorities in both Greece and Cyprus do not seem to stress enough the need for participating in formal educational and learning avenues for older adults as they prioritise social care within the family. This approach has negative repercussions in accessing learning by this age group (50–74), but more importantly, in motivating older adults to participate. According to Mastroyiannakis and Mestheneos (2004), Greek seniors are highly active and participant in family affairs, especially in the early stages of later life. However, as they grow older they tend to consider themselves as being ‘too old’ to be interested in educational opportunities. Given that Greek and Cypriot seniors would be invited to participate in further educational opportunities planned for the general population – as these were described in the previous section – and not in specialised ones, such seniors would necessarily need to have some level of education and high motivation to attend. Another stumbling block is that, in many cases, one must pay for the seminars from their own budgets. This means that it is only those older persons who are not experiencing any financial difficulties who can afford to participate in most learning opportunities. This essentially functions as a barrier for furthering educational interests in later life. This is largely confirmed by the very low participation rates of older adults in education and learning activities (well below the EU average) in both countries (Table 14.2).

Opportunities for older adults to access and participate in educational and learning activities are further reduced considering that the Adult Education Centers (KEE) in Greece have ceased their operation since 2011, whereas the new structures that are about to be developed in Greece (such as Lifelong Learning Centres [KDVM]) do not foresee educational provision for older persons. The Prefectural Centres for Popular Education are still continuing their operation, but as it was explained earlier they do not provide educational services targeting older persons. Along the same lines, Adult Education Centres (PES) in Cyprus offer a limited

number of programmes in both urban and rural areas, usually on the premises of public schools. In an effort to offer access to free education to all citizens, PES occasionally organize special classes each year which are tailored specifically to meet the needs of various disadvantaged groups, such as senior citizens. Despite the efforts however political will is lacking and priorities set by both states do not consider educational gerontology as part of the social care agenda. This essentially creates a gradually increasing *policy deficit* that renders older adults de-motivated, more vulnerable, and deprived of the benefits of learning and education.

The limited number of educational and learning opportunities, the lack of specific policies, and the low level of motivation among older adults to participate, eventually create a passive attitude towards learning in this age group. One would think that older adults in both countries must have developed their own way to achieve learning outside the official state framework, or as part of their own free time. Unfortunately there are not many studies about the activities and the use of the free time of Greek and Cypriot older persons. Older adults in Greece and Cyprus do not appear to have a wide range of social and learning activities, although they are physically active, mainly between the ages of 65–75. The main activity has to do with the help they provide to their children's families. Their participation in educational activities is negligible; their participation in social networks and non-governmental agencies is marginal; the visit and use on their part of libraries minimal; and reading is not the activity of their choice. However, it should be pointed out that there are many inter-individual differences, so we must carefully avoid wide-sweeping generalisations. Moreover, there are marked differences in the roles of men and women: women mostly take care of the family and assist with the upbringing of grandchildren, though significantly less after the age of 80. Men become active outside the house, while they also take care of the grandchildren. The most common way Greek and Cypriot men spend their time is by going to coffee shops, where they meet with other men to chat and play games (backgammon, chess, cards, etc.). The development of relationships between older males and their children and grandchildren is considered the number one health enhancing agent for older persons. In both countries contrary to what happens elsewhere in Europe, women are more active concerning the overall care of things, especially the care of the house. Housework helps women to stay more active than men after the age of 80. As far as physical activities of the seniors is concerned, Mestheneou and Antoniadou (2004) observe that the physical activity of older persons is moderate-to-low, lack of adequate income factor is considered to be the main contributing factor, whereas the limited physical activity for older persons is due to the prevailing socio-educational conditions according to which a 'way of life' is being established, which does not encourage physical activity. This long standing attitude eventually contributes to a *cultural deficit* among people in this age group that limits even more access and participation to educational and learning activities. This cultural deficit results in spending much time in sedentary activities (Karagiannaki 2005).

14.1.4 Epilogue

In contemporary times, the learning provision for older adults as part of the social care system in Greece and Cyprus is on the edge of a transition. The dominant trend in political discourse is to address the condition of services in the community and presume the strengthening of local authorities as service providers, whilst upgrading the third sector to become an active actor too (Moukanou 2009). The examination of the conditions that hinder older adults from accessing and participating in organised educational and learning activities – within the broader framework of social care – raises many issues that are essentially germane to the current socio-economic crisis.

In the early days of the crisis, there was willingness to boost social protection systems to prevent hardship, but this weakened as the priority shifted to reducing public deficits. This process is largely mirrored in the approach of the EU which has, since the beginning of the crisis, taken a key role in attempting to co-ordinate responses. Initially, in 2008 the EU's response included a commitment to an anti-cyclical approach 'alleviating human costs' by maintaining jobs, and supporting the most vulnerable through strengthened social protection and services. But as financial instability grew, alongside increased public debt and deficits, priority shifted to salvaging the euro and enforcing a neo-liberal recovery plan focused on a narrow interpretation of competitiveness and fiscal consolidation (Hanan 2012). Alternatives to the present approach that creates social deficits, and leaves older adults in Greece and Cyprus being unprotected and at risk of poverty, are possible. Nevertheless, the need to build and mitigate for new alliances that contribute towards a better future for older persons are complex and far from straightforward. For instance, intergenerational conflicts are likely to arise as inescapable trade-offs between economic and social challenges will emerge.

What is essentially needed is better empowerment levels amongst older persons – that is, empowerment in the Freireian sense of the term, which fundamentally challenges people's assumptions about the way things are and should be. It is in this sense that Greek and Cypriot societies need to challenge their basic assumptions about power, helping, achieving, and succeeding. An urgent step in the right direction consists in beginning to demystify the concept of empowerment, with both Greece and Cyprus being more clear about how and why their focus of empowerment for specific programmes and projects (specific dimension or level, for example) is too narrow, and hence, allowing a discussion of empowerment across disciplinary and practice lines in the context of educational gerontology. It is therefore crucial to improve the capacity of this age group to make choices and to transform those choices into desired actions and outcomes. Central to this process are actions that build individual and collective assets, and improve the efficiency and fairness of the organisational and institutional context that governs the use of these assets. To be really empowered seniors need to have freedom of choice and action. This in turn will enable them to possess higher levels of influence on the course of their lives and the decisions that affect them.

One possible way forward to achieve improved levels of generational cohesion, as well as more optimal levels of older adult learning, is to ensure that younger generations are also given key roles. Members of younger generations, who tend to be more active and hold relatively stronger empowerment levels, as well as in receipt of most benefits resulting from an inclusive society, should be principal roles in efforts to promote pro-active social impact assessments on the causes and consequences of population ageing. This has the potential to result in the endorsement of alternative lifestyles in later life, that reduce the deficits – communication, policy, culture – normally associated with retirement. Indeed, solidarity between generations can actually boost demand whilst also including a commitment to a social model which offers adequate protection and equality of opportunity to all. Hence, supporting a comprehensive rethinking of the development model which has dominated recent decades, with a view to devising an alternative that allows for the hope of building a better life for older persons.

The above objectives, however, cannot and must not be adopted without the involvement of older adults themselves. In the process of linking different generations in both Greece and Cyprus older citizens need guidance and counselling. This type of support has to be provided in a way that allows older persons to maintain their self-esteem, to be able to behave as active citizens, with full citizenship rights, and so as to prevent increasing vulnerability and poverty trends. Counselling assistance is also to be provided with the objective of enabling older persons to acquire modern skills and knowledge. This requires that adult training should not be only focusing on the requirements of the labour market. Rather, all the forms of lifelong learning should be supported, encouraging all the possible types of self-directed learning, if one hopes that older and ageing persons acquire the needed and essential skills. That practice has to lead to a framework in which state subsidies are provided only for accredited training institutions, because only such a strategy enables the access of older persons in acquiring more complex and expansive knowledge, is counterproductive. Rather, it is best if a mentoring network is established. This will organise and support the process of empowering older adults, whilst also taking steps towards improving levels of active ageing and ensuring tutoring for their self-education at each phase of the life course, in each district, university, cultural centre and library. Conceivably, a ‘seniors’ information mentor or ‘seniors’ educator’ profession has to be developed as a new vocation so as to readdress the role of older adult education in Greece and Cyprus.

The enactment of such initiatives are to be enacted with the support of younger people actively involved in the training, tutoring, and mentoring of older persons (for example, in the provision of guidance on information and communication technology, media, and knowledge materials). At the same time, there is no doubt that older persons are highly proficient in the generational transmission of values to ensure the education of the young people (transferring education, sport, active leisure time, culture, traditions) – a potential that ensures that they spend their free time in a useful and constructive manner. Without an assisting information network it is impossible for older citizens in marginalised and subaltern situations (people with lower education or with obsolete skills) to participate in efficient self-training,

to explore their development opportunities, or to get access to training and labour opportunities. Indeed, it depends on the younger mentors whether society will be able to open the way for older generations.

Ultimately the members of the older generation in both Greece and Cyprus have to establish their own networks. To this end they need the assistance of mentors and civil organisations. Older persons need help from civil society to provide tangible solutions for challenges relating to health and social care, learning, and law enforcement problems. Greek and Cypriot senior citizens need to establish co-operative, societal, non-profit enterprises, for the precise reason that they cannot rely on anybody else to mitigate for and advance their interests. It is also necessary for the state to support such organisations, equally on national and regional levels, in order to maintain the subsistence of older persons. Such special enterprises are best placed to establish the financial basis of various educational and learning initiatives for older persons that may be premised on foundations ranging from vocational to leisure interests.

References

- Age Platform Europe. (2012). *Older people also suffer because of the crisis*. www.50plus.gr/wpcontent/uploads/2012/12/olderpeoplealsosufferbcofthe_crisis-en.pdf. Accessed 20 Mar 2013.
- Bettio, F., & Plantenga, J. (2004). Comparing care regimes in Europe. *Feminist Economics*, 10(1), 85–113.
- CEDEFOP. (2003). *Lifelong learning: citizens' views*. www.cedefop.europa.eu/EN/Files/4025_en.pdf. Accessed 29 Nov 2013.
- European Union Statistics on Income and Living Conditions. (2012). *At-risk-of poverty rate by detailed age group*. <http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&plugin=1&language=en&ocode=tessi120>. Accessed 29 Nov 2013.
- Eurostat. (2012). *News-release euro-indicators* (Number 171/2013). http://www.epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/3-03122012-AP/EN/3-03122012-AP-EN.PDF. Accessed on 14 Sept 2013.
- Eurostat. (2013a). *News-release euro-indicators* (Number 31/2013). http://www.epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/3-01032013-BP/EN/3-01032013-BP-EN.PDF. Accessed 14 Sept 2013.
- Eurostat. (2013b). *News-release euro-indicators* (Number 40/2013). http://www.epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/2-14032013-AP/EN/2-14032013-APEN.PDF. Accessed 14 Sept 2013.
- Hanan, R. (2012). *The social impact of the economic crisis in Europe*. <http://www.workingnotes.ie/index.php/item/the-social-impact-of-the-economic-crisis-in-europe>. Accessed 13 Aug 2013.
- Hellenic Statistical Authority. (2010). *National statistics authority data*. <http://www.statistics.gr/portal/page/portal/ESYE/PAGE-database>. Accessed 18 June 2013.
- Hoff, A. (2008). *Tackling poverty and social exclusion of older people – Lessons from Europe*. Oxford: Oxford Institute of Ageing Working Papers. www.ageing.ox.ac.uk. Accessed 16 Sept 2013.
- Karagiannaki, E. (2005). *Changes in the living arrangements of elderly people in Greece: 1974–1999. CASE/104*. London: Centre for Analysis of Social Exclusion.
- Karl, F. & Friedrich, I. (2007). *Seniorenbildung in Europa* [Seniors' education in Europe] (Band 37). Kassel: Kasseler Gerontologische Schriften.

- Koutsampelas, C. (2012). Aspects of elderly poverty in Cyprus. *Cyprus Economic Policy Review*, 6(1), 69–89.
- Mastroiannakis, T., & Mestheneos, L. (2004). *Actual trends in senior citizens' education*. Athens: Pan European Forum for Education of the Elderly.
- Mestheneou, E. & Antoniadou, K. (2004). *National report of Greece for the MERI Project*. <http://www.own-europe.org/History/meri/>. Accessed 10 Aug 2013.
- Moukanou, E. (2009). *Social care services for the elderly in Greece: Shifting the boundaries?* Paper Submitted to the 4th Biennial Hellenic Observatory PhD Symposium on 'Contemporary Greece and Cyprus', Hellenic Observatory, European Institute, London School of Economic, June 25–26, 2009.
- Sissouras, A., Ketsopoulou, M., Bouzas, N., Fagadaki, E., Papaliou, O., & Fakoura, A. (2002). *Providing integrated health and social care for older persons in Greece*, National Centre for Social Research (EKKE) & PROCARE, Athens: EKKE. Available at: www.euro.centre.org/procare/body_reports_natreps/procare_Greece_NR.pdf. Accessed 30 Nov 13.
- Στρατηγάκη, Μ. (2006) *Το φύλο της κοινωνικής πολιτικής*. Αθήνα: Μεταίχμιο [Stratigaki, M. (2006). *The gender of social policy*. Athens: Metechmio].
- Szewbs, C., Pinstup, H., Schmidt, J., Burmeister, U., Scocchera, F., Sdogati, C., Piangerelli, E., Marcinelli, D., Bogowolska-Wępsięć, M., Zwiefka, A., Duarte, V. Pires, P., & Smith, G. (2008). *An ageing Europe: Challenges of the European senior service sector*. <http://senior-service-sector.eu:8180/opencms/export/sites/default/4LC/en/Results/NationalReports/WP2TransantionalReportChallengesENG.pdf>. Accessed 28 Nov 13.
- Triantafyllou, J., Mestheneos, E., Prouskas, C., Goltsi, V., & Kontouka, S. (2006). *EUROFAMCARE: The Greek national survey report – Executive summary*. <http://www.uke.de/extern/eurofam-care/>. Accessed 8 June 2013.

Chapter 15

Hong Kong

Ernest Chui and Xinyi Zhao

15.1 Hong Kong – A Chinese City

Hong Kong is now a ‘Special Administrative Region’ under the People’s Republic of China. It was previously a British colony in the period 1842–1997. It is essentially a Chinese community, with 94 % of its population being ethnic Chinese. Its GDP in 2012 recorded US\$263 billion and per capita GDP US\$36,667 (International Monetary Fund 2013), only second to Japan in Asia. Similar to other advanced economies, Hong Kong has also gradually been confronted by the challenges of an ageing population. It now has the second highest proportion (19 %) of older people (aged 60 or above) in the population in Asia, after Japan (32 %) (United Nations 2012). In 2011, people aged 65 or above accounted for 13.3 % of the total population, and is projected to be 30 % by 2041 (Census and Statistics Department, Hong Kong Special Administrative Region Government C&SD, HKSARG 2012, 2013). Benefitting from improved living standards, health services, and other factors, the life expectancy of elders has increased over the years: in 2011, the expectation of life at birth was 80.5 years for males and 86.7 years for females respectively (C&SD, HKSARG 2012).

Many of the current cohort of older people on average had relatively low levels of educational attainment, probably due to the fact that they migrated from the Mainland during the 1940–1950s when they were young. The opportunity of attending school in those turbulent times was slim, and more so for the women from the rural

E. Chui (✉)

Department of Social Work and Social Administration, The University of Hong Kong,
Hong Kong, China

e-mail: ernest@hku.hk

X. Zhao

Institute for Medical Humanities, Peking University, Beijing, China

areas. However, several decades on, the education level of the younger cohorts of older people has been improving: the percentage of older persons (aged 65 and above) having no schooling or pre-primary education decreased from 42.4 % in 2001 to 31.7 % in 2011; that of having secondary schooling increased from 14.6 % (2001) to 23 % (2011); and for those having degree level education have increased from 3 % (2001) to 5 % (2011) (HKSARG, C&SD 2013).

15.2 The Socio-Cultural Context of Elder Learning

The origin of elder learning in Hong Kong could be traced back to the 1980s when learning opportunities were mainly provided by social service centres adopting a non-formal approach in offering courses that were mainly for leisure or recreational, not credit-based (Zhang and Ha 2001) and without formal assessment or credentialing. More recent development reveals a proliferation of a wider variety of learning programmes that cater for the diverging needs of older adults.

As Hong Kong is a Chinese community, one can trace the possible incidence of cultural roots that have affected the development of elder learning. The traditional Chinese cultural norm of filial piety or respecting seniors is a favourable normative order that supports endeavours in promoting elderly service in general and elder learning in particular. The Confucian-heritage culture (CHC) places high emphasis on learning which is regarded as indispensable for inculcating a morally excellent life and becoming a virtuous person (Kim 2004, p. 117). The learning behaviours in CHC-influenced East Asian countries were described as social, family, group, and long-term oriented with an indirect communication style and a preference for virtuous behaviour (Lu et al. 2003). Learning was conceived by Confucius as ‘learning for the sake of the self’, and for enriching one’s life and character. A traditional Chinese saying reads ‘one has to learn when one grows old’, which vividly spells the normative framework of Chinese people in maintaining a learning aptitude. Nevertheless, one also has to reckon that in the various dynasties in China’s history, the scholars or the ‘knowledgeable’ or ‘gentry’ class had enjoyed a prestigious position in society, especially as education enabled them to pursue officialdom. In the contemporary context, educational attainment is certainly an indispensable human capital for achieving upward social mobility.

However, one could cast a sceptical view on the applicability of such CHC normative order, especially in the context of Hong Kong in which the current cohort of older people are relatively less educated, as most of them are immigrants coming from mainland China in the war years (1940–1950s) or even from rural villages, and thus their identification with such ‘classic’ Confucian normative precepts of ‘learning’ is questionable. This also echoes the criticism that Confucius was elitist and sexist in his disposition, as he apparently had only attended to educated scholars and men (Kim 2004).

Apart from cultural heritage, government policy rightly is a critical factor in influencing the development of elder learning. Together with Taiwan, Korea and

Singapore, Hong Kong has been regarded as a ‘Tiger’ in Asia that has spectacular economic development since the 1960s. However, social policies in these ‘Tiger states’, including that of education, have been relatively less developed, in which social welfare had served a supplementary role and education was merely regarded as contributory to economic development rather than enhancing personal development per se. Although the government has devoted considerable public revenue to education, it is targeted to youth, mostly for vocational training; rather than adults, not to mention older people. This shows that the Hong Kong government has only placed lifelong learning for older people as a low priority. Even when the then colonial government stepped up to improve social service provision in the 1970s, services for older people were mainly of a remedial nature prioritizing health and poverty alleviation, and the developmental needs of elder learning were not attended to.

With the upcoming challenges of an ageing population in the 1990s, the Hong Kong Government has become increasingly aware of the needs of senior citizens. The inaugural government set up the Elderly Commission in 1997 upon the transfer of sovereignty as a deliberate move to show its embracement of traditional Chinese virtue and cultural normative order (of respecting seniors). The Commission is charged with the responsibility to oversee the coordination of various policy domains for older people and to promote respect for seniors in society. Thus, elder learning has been lifted to a higher policy agenda.

15.3 Major Stakeholders in Promoting the Development of Elder Learning

There are three major sectors – the NGOs, the government and business (in that order) that have contributed to the development of elder learning in Hong Kong. NGOs in Hong Kong pioneered in the 1980s in introducing elder learning when they started offering interest classes in the elderly centres (Leung et al. 2006). These NGOs have received government funding in operating the elderly centres, and in this regard, the government may be regarded as supporting elder learning too. Currently, the majority of learning opportunities for older people are offered by NGOs and academic institutions with government financial support.

With respect to the government, it has not been a direct provider of education services for older people; it provides funding to NGOs in operating the centre-based services that offer non-formal education opportunities to older people. The Elderly Commission (EC) since 1997 has taken up a more prominent role in promoting services for older people in general, and elder learning in particular. The Commission launched the ‘Opportunities for the Elderly Project’ in 1997; and subsequently in 1999, the then Chief Executive proclaimed such concepts as ‘Learning for Life’, ‘Learning through Life’ and ‘Successful Ageing’, which bestow the Commission with the mandate for promoting elder learning (Lui et al. 2002).

The business sector has not been involved in the direct provision of educational services or programmes for older people. However, some corporations (e.g. Hong Kong Electric Centenary Trust) provide funding to support NGOs in operating the U3A. The Hong Kong Jockey Club Charities Trust in 2001 provided a grant to support the EC to launch a 3-year Community Partnership Scheme to support innovative projects and education programmes that promote healthy ageing and learning.

15.4 Guiding Principles for the Implementation of Elder Learning

The promotion of elder learning in Hong Kong is very much mirroring the evolution of social service development in Hong Kong in general, that is, the NGO sector precedes the government in pioneering and developing relevant services. As the NGO sector has enjoyed relative autonomy from government intervention, albeit receiving government subsidy, they can design their own strategy of developing elder services in general and elder learning in particular. Moreover, as there is a wide diversity of NGOs providing elder services, there is a plurality of delivery modalities found amongst different operators. Amongst the NGOs operating the various types of elder learning, there could be a range of diverse guiding principles in accordance with the agency philosophy, the ideological stances of the social workers involved and also the participants' socio-economic characteristics. For instance, for those social centres for elders that serve relatively less educated members, there might be the element of 'compensatory education' built in the delivering of training and interest classes. Social workers inspired by precepts of empowerment might organize elder learning with notions of 'emancipatory' or 'liberating education' (Freire 1985). In general, most social service agencies implementing elder learning programmes would subscribe to such notions as *healthy ageing*, *active ageing*, *successful ageing*, and more recently, *productive aging*. Thus, there is no deliberate 'guided' development, nor an overarching philosophy or concept but only a 'natural course of action' in the evolution of elder learning.

As for the government, it was only until 1997 when it set up the Elderly Commission that signified its more prominent role in the overall steering of elder service development, including elder learning. The Commission has promoted healthy ageing and active ageing as its guiding philosophy in general, and has heralded 'inter-generational inclusion' and 'inter-generational harmony' in its promotion of the Elder Academy initiative. Nonetheless, there is no specific legislation stipulating any statutory requirement and/or provision related to elder learning.

15.5 Modes of Elder Learning in Hong Kong

Given the plethora of NGOs, supported by the government and some private funding, there has been a proliferation of a variety of elder learning programmes in Hong Kong. The following provides a brief introduction of the major types.

Classroom Learning Being the most prevalent mode, classroom learning originated in the 1980s from the interest classes organized by elderly centres at the district and neighbourhood levels. Many of these classes are designed and organized by the professional social workers of the operating NGOs and delivered by hired or volunteer instructors. This differs from the UK self-management model of U3A that capitalizes on the elder learners' own initiatives.

Elder Radio-Broadcast Learning Institute While there are commercial radio and television operators in Hong Kong, it is only the government that operates a radio channel that specifically tailors to older audiences. Since 1999, the Radio Television Hong Kong operates a Radio College for Elders. The College provides a variety of elder-friendly programmes, including foreign languages, health information, tips for daily-life, current affairs, and has been very well received amongst the senior citizens as many of them still adhere to listening to radio, especially the lower-income seniors who may not afford the price of a television and the electricity fees incurred.

On-line or E-learning Online learning has the merit of providing universal and easy access without spatial or temporal constraints, or limitations of quota due to unavailability of a venue, at relatively low costs, even for frail and home-bound seniors. Nonetheless, problems of a digital divide may become a hurdle. In Hong Kong, when compared with other major disadvantaged groups like single parents, children of low income households, senior citizens lagged behind in internet utilization (Wong et al. 2009). Only about 10 % of Hong Kong's elders are computer literate and have access to computers (C&SD, HKSARG 2009). Taking cognizance of this fact, the government has exerted effort to enhance older people's awareness and mastery of information technology. For instance, the Information Technology Service Department's 'IT Awareness Programme for Elders' provided free IT courses to elders aged 60 or above; the Office of the Government Chief Information Officer invited elder service agencies to join the 'eElderly Digital Navigation Centres' to support older members to acquire computer literacy. The government has set up the Digital Solidarity Fund with government funding and private sector donations to support NGOs in promoting 'digital inclusion'. The Elderly Commission and NGOs have provided training courses at schools and elder centres. A local NGO provides a website from which the older people can access free learning materials and learn in leisure programmes.

Learning Programmes Built in the Formal Educational System Currently, most of the elder learning programmes are operated by NGOs without formal accreditation or are non credit-bearing. In view of the aspiration of some older people to have formal recognition, a local university in collaboration with a NGO has since 2002 launched an associate degree programme majoring in applied gerontology for people above 50 years old. The programme has waived all academic requirements for older adults to reduce the barriers. The programme also admits teenage school-leavers, to promote inter-generational interaction and thus inclusion by having a natural mix of students of different ages. In addition to the conventional university mode of lectures and tutorials, the programme arranges students to have practica in elder services organizations to capitalize on experiential learning.

Elderhostel Resembling the global trend of ‘youth hostels’, *elder-hostels* have also become increasingly popular, which is very much related to the gradual improvement in the socio-economic status of senior citizens. Hong Kong is no exception to this trend, in which some older people can afford to engage more in local and overseas travels and tourism. Some NGOs in Hong Kong have started organizing elder-hostels to prepare for the upcoming market of the baby-boomers who enter their retirement stage.

The Elder Academy The Hong Kong Government and the Elderly Commission launched the Elder Academy Scheme in 2007 to promote cross-sectoral collaboration and inter-generational harmony. The aims of the scheme include the following: to promote life-long learning, to maintain healthy physical and mental well-being, to realise the objective of fostering a sense of worthiness in elders, to optimise existing resources, to promote harmony between the elders and the young, to strengthen civic education, and to promote cross-sectoral harmony (Elderly Commission and Hong Kong 2013). The Commission adopts a ‘school-based’ approach in which local primary and secondary schools, with the support from NGOs, serve as sponsoring bodies to run ‘elder academies’. Through this, older people have the chance to work and interact with young students. Each academy enjoys the autonomy in the operation under a management committee constituted by the school’s parent teacher association members. The local universities also offer some courses that are properly accredited and allow the seniors to enrol in modules of undergraduate studies as non credit-bearing courses. As at 2013, 108 elder academies have been established in primary, secondary and tertiary education institutions.

U3A Development In 2006, local NGOs learned from the U3A movement originating in France, Australia and other western developed countries and launched a U3A Network, the initiation emerging from the Hong Kong Council of Social Service (HKCSS), and the financial support from the Hong Kong Electric Centenary Trust. The Trust provides seed money to the HKCSS member agencies. The target participants are those aged 50 and above, so as to cater for the early retirees and housewives who have relinquished their household duties. Participants are encouraged to teach and manage their respective U3A learning centres, so as to promote lifelong learning and volunteerism in serving the community. The project operates

with the emphasis of self-initiating, self-managing, self-teaching, and self-learning. Most U3As are operated on a self-financing basis and are staffed only by elder volunteers with no paid staff, while some affiliate to NGO-operated elder centres.

With the diversity of providers and lack of central coordination, there are no readily available statistics that reveal the profile of participants in lifelong learning in Hong Kong; yet, it could be revealed partially from a study (Hong Kong Council of Social Service 2002). It was found that men participated less than women. It might be attributable to the aversion of older men in joining organized activities and that men enjoyed a better chance of receiving formal education during their young age within the context of traditional favouritism to sons in the family. Besides, it was also found that ‘the uneducated’ were also the least to participate, probably due to the fact that some of the learning activities may require a minimum level of literacy, and that these less educated older people had a lower self-image that impeded them from joining learning activities. Those having a higher prior educational level were more prone to be active participants. However, many of the elder learning programmes are provided by elder social centres that are located in public housing estates (i.e. ‘social housing’ or government subsidized rental housing) with a high concentration of older people who have relatively lower education and financial means.

15.6 Challenges in Sustaining Elder Education

There are a host of issues confronting the development of elder learning in Hong Kong, including shortages in financial and human resources and the diverse and changing educational needs of different groups of older adults.

Although Hong Kong is quite a prosperous society, the government and the business sector have not yet made sufficient financial support to promoting educational services for our seniors. Specifically, the funding mode and sustainability for the Elder Academy (EA) have been questioned, as EA providers operate largely on a fee-charging self-financing basis. Numerous providers have to compete in the ‘marketplace’ with quality service or attractive fee levels (Tam 2012).

Although there is possibly a positive scenario for the further development of elder education, especially in view of the coming of the baby-boomer cohort, the government has not yet devised any comprehensive policy or plan to promote elder learning. There might be the incidence of an ageist stance in related government policies. For instance, the government has instituted the Continuous Education Fund to support adults pursuing continuing education for personal and professional development. However, the age eligibility is capped at 65, practically denying those seniors above this age their right to subsidy. The Fund also apparently has a skewed emphasis on occupational training which is not usually the major concern of older adults after retirement. Thus, there is need for the government to review its policy and resource allocation in supporting elder learning.

With the foreseeable increase in demand for learning opportunities from a diverse group of older adults, there is concomitant demand for instructors. There is a positive trend where some of the retired professionals or senior executives are increasingly apt to serve as instructors based on their respective expertise. Besides, the Elder Academy can mobilize youngsters to serve as instructors. Some seniors from the U3As who adopt a self-management approach may serve as instructors. However, there is still a need to ensure the recruitment, training, retention, support, replenishment and even monitoring of these various types of instructors to ensure the delivery of appropriate and quality educational services to seniors.

Elder learning has a 30-year history in Hong Kong and is exhibiting diverse features in terms of modes and profile of participants. Due to historical reasons, Hong Kong's current cohort of older people is characterised by having a substantial portion with low socio-economic status and low literacy, unsatisfactory financial security and even physical limitations due to frailty and poor health. With the advent of the baby-boomers entering their retirement, it is foreseen that this coming cohort of older adults would have more favourable resource endowment in health, finance, and education. They may constitute an emerging 'silver market' in general, and learning in particular, thus providing extra impetus for the development of elder learning. However, there are obvious differences in aspiration, educational needs, and learning strategies amongst these different groups of older learners that require service providers to devise appropriate strategies to cater for such diverse needs.

15.7 Concluding Remarks: The Future of Elder Learning

It is anticipated that in the coming decade the current soon-to-be-old or baby-boomer cohort would constitute the major market for lifelong learning activities. This future cohort of seniors should be relatively better off than the current cohort in terms of health, financial situation, literacy and personal efficacy. Their aspirations for learning may not be satisfied by the sheer provision of conventional, classroom, teacher-oriented, leisure or interest oriented types of learning activities currently provided by the majority of NGO providers. In any case, providers of elder learning programmes must recognize that the community of older persons actually comprises a wide variety of people with multifarious dimensions of difference (Ferraro 2007).

Elder learning programmes providers should recognize the specific learning styles of older adults. Elder learning, as part and parcel of adult learning, is basically a cooperative venture in informal, non-authoritarian learning environment. The main objective for adult learning is to discover the meaning of experience, and is therefore 'life-centred'; that is, targeted toward enhancing people in their functioning in daily living, instead of merely acquiring a particular academic qualification. Thus, the appropriate units for organizing adult learning are life situations but not subjects (Knowles 1990).

Local NGOs have pioneered in using multifarious means and themes in promoting older adults learning. However, in view of helping older adult learners to transcend simplistic acquisition of specific knowledge and/or skills, one possible strategy is to ingrain elements of empowerment into the learning processes. The concept of empowerment can lend itself to various interpretations; but it could be reduced to 'personal' (or individual) and 'collective' levels respectively. For individual or personal empowerment, it could relate to enhancing an individual's mastery of knowledge, skills and aptitude. For instance, a computer-illiterate older adult may be empowered by learning basic computer skills, thus being able to communicate with his/her family members who have migrated overseas. In another instance, a chronically-ill senior is empowered by acquiring self-care knowledge and skills in drug compliance and rehabilitation exercises, and thus could achieve a higher level of self-management. As for collective level, groups of older people may gather together to discuss elder welfare policy issues, and then put up requests to the government as policy advocacy, thus achieving collective empowerment. This would enhance their competence, sense of agency, and even achieving anti-discrimination in society.

Lifelong learning for older people is conducive to promoting older people's active ageing and enhancing their quality of life, and there is virtue in promoting elder learning in a society. There can be different lifelong learning models, as categorized according to the recipient targets and the goals of education that can be adopted by any society. These include, firstly, the 'compensatory education model' which is to rectify the social inequalities precipitated in the formal education system. Secondly, the 'leisure-oriented model' provides learning activities premised on leisure and social recreational motivations. Thirdly, the 'continuing vocational training model' aims at enhancing competence of the general or specific population in their occupations. Fourthly, the 'social innovation model' promotes socio-economic development at large (Aspin and Chapman 2007; cited in Chui 2011). The Hong Kong community, including older people themselves as the main stakeholder, the providers, the government, and the business sector, should collaborate to promote a model or even a mixture of different models that caters to the specific needs of the Hong Kong elder population, with reference to the socio-economic context of Hong Kong in face of an ageing population.

15.8 A Successful Case of Elder Learning

A local NGO integrated 'learning' with 'therapy' in promoting elder learning. The NGO identified a group of single older men who were suffering from different degrees of depression or self-isolation. The social worker capitalized on his proficiency in music, recruited the group of men to form into a jazz band. While some of those men were engaged in basic mastery of such musical instruments as guitar, saxophone, or drums, others were entirely amateur. The agency provided facilities, musical instruments, and the social worker served as the instructor. The band

eventually gathered momentum in producing a public performance. The process involved ‘learning’ of playing a musical instrument and also a therapeutic process of alleviating the self-isolation or depression of those men. This could be conceived as a process of self-empowerment mentioned above.

References

- Aspin, D. N., & Chapman, J. D. (2007). Lifelong learning: Concepts and conceptions. In D. N. Aspin (Ed.), *Philosophical perspectives on lifelong learning* (pp. 19–38). Dordrecht: Springer.
- Census and Statistics Department, Hong Kong Special Administrative Region (SAR) Government. (2009). *Thematic household survey report No. 43. Information technology usage and penetration*. Hong Kong.
- Census and Statistics Department, Hong Kong SAR Government. (2012) *Hong Kong population projections 2012–2041* (press release). Hong Kong.
- Census and Statistics Department, Hong Kong SAR Government. (2013). *Hong Kong 2011 Population census thematic Report: Elderly persons*. Hong Kong.
- Chui, E. (2011). Elderly learning in Chinese communities – China, Hong Kong, Taiwan and Singapore. In G. Boulton-Lewis & M. Tam (Eds.), *Active ageing, active learning: Issues and challenges* (pp. 141–162). Dordrecht/Heidelberg/London/New York: Springer.
- Elderly Commission, Hong Kong. (2013). *Elder Academy*. <http://www.elderacademy.org.hk/en/aboutea/index.html>
- Ferraro, K. F. (2007). The gerontological imagination. In J. M. Wilmoth & K. F. Ferraro (Eds.), *Gerontology: Perspectives and issues* (pp. 325–342). New York: Springer.
- Freire, P. (1985). *The politics of education: Culture, power, and liberation*. Basingstoke: Macmillan.
- Hong Kong Council of Social Service. (2002). *Learning needs and preferences of members of multi-service members for elderly and social centres for elderly: Final report*. Hong Kong: The Hong Kong Council of Social Service.
- International Monetary Fund. (2013). Gross domestic product per capita, current prices. *World economic outlook database April 2009*. Retrieved September 30, 2013, from <http://www.imf.org/external/pubs/ft/weo/2013/01/weodata/weoselgr.aspx>
- Kim, K. H. (2004). An attempt to elucidate notions of lifelong learning: Analects-based analysis of Confucius’ ideas about learning. *Asia Pacific Education Review*, 5(2), 117–126.
- Knowles, M. (1990). *Adult learner: A neglected species* (4th ed.). Houston: Gulf Publishing.
- Leung, A., Lui, Y. H., & Chi, I. (2006). Later life learning experience among Chinese elderly in Hong Kong. *Gerontology & Geriatrics Education*, 26(2), 1–15.
- Lu, L., Cooper, C. L., Kao, S. F., & Zhou, Y. (2003). Work stress, control beliefs and well-being in greater China: An exploration of sub-cultural differences between the PRC and Taiwan. *Journal of Managerial Psychology*, 18(6), 479–510.
- Lui, Y. H., Leung, A., & Jegede, O. J. (2002). *Research report on overseas experience in providing continuing education for elderly persons*. Hong Kong: The Open University of Hong Kong.
- Tam, M. (2012). Lifelong learning for elders in Hong Kong: Policy and practice. *International Journal of Lifelong Education*, 31(2), 157–170. doi:10.1080/02601370.2012.663805.
- United Nations. (2012). *Population ageing and development 2012*. New York: Department of Economic and Social Affairs. Retrieved September 30, 2013, from http://www.un.org/en/development/desa/population/publications/pdf/ageing/2012PopAgeingandDev_WallChart.pdf
- Wong, Y. C., Fung, J. Y. C., Law, C. K., Lam, J. C. Y., & Lee, V. (2009). Tackling the digital divide. *British Journal of Social Work*, 39(4), 754–767.
- Zhang, W. Y., & Ha, S. (2001). *An investigation into the learning attitude, motivation and preferences of the older adults in Hong Kong*. A paper presented for the 15th Annual conference of the Asian Association of open Universities hosted by Indira Gandhi National Open University, New Delhi.

Chapter 16

India

Ilango Ponnuswami, Sonny Jose, and Praveen Varghese Thomas

Older adult learning has been receiving considerable attention in many developed nations around the world (Findsen and Formosa 2011). However, due to other challenging priorities such as poverty, unemployment among the youth, lower rates of enrolment of children and youth in educational institutions and so on, in most of the developing or least developed nations, the whole idea of older adult learning does not seem to have much traction. Although global levels of education and literacy have risen significantly over the past century, they tend to be lower for older persons than for younger cohorts, largely because younger individuals have benefitted from recent increased attention given to education. There are also considerable differences between developing and developed countries in terms of educational attainment and literacy levels among older people. India stands a dismal 73rd in the list of 91 countries, according to an UN-sponsored study on the well-being of ‘the elderly’ in a rapidly ageing world. India’s position in terms of employment and education of older people is relatively low when compared to other developing countries (HelpAge India 2013). The educational environment for older persons in India is not that bright when compared to European countries.

I. Ponnuswami (✉)

Department of Social Work, Bharathidasan University, Tiruchirappalli, India
e-mail: pon.ilango@bdu.ac.in; pon.ilango@gmail.com

S. Jose • P.V. Thomas

Loyola College of Social Sciences, University of Kerala, Thiruvananthapuram, India
e-mail: sonny.jose@gmail.com; praveenvarghesemsw@gmail.com

16.1 The Situation of Older Persons in India

According to the United Nations Population Division, India's population aged 60 and older is projected to increase dramatically over the next four decades, from 8 % in 2010 to 19 % in 2050. By mid-century, this age group is expected to encompass 323 million people, a number greater than the total U.S. population in 2012. This profound shift in the proportion of older Indians taking place in the context of changing family relationships and severely limited old-age income support, brings with it a variety of social, economic, and health care policy challenges (Population Reference Bureau 2012). Another report released by the United Nations Population Fund and HelpAge India to mark the International Day of Older Persons (observed on October 1) indicated that India had 90 million older persons in 2011; of these 90 million seniors, 30 million are living alone, and 90 % continued to work for livelihood. Experts estimate that in India only 8 % of the labour force of about 460 million receives any form of social security from an employer, whereas, in the West, positive discrimination towards older persons in the labour market has had a great impact on beliefs about the adaptability of older workers, social security and on attitudes towards older workers.

The report further describes the number of older women to be more than that of older men; three out of five single older women were estimated to be "very poor", and two out of three rural older women are fully dependant on others because of some form of infirmity. There was also seen to be an increasing proportion of elderly at 80-plus ages, the pattern being more pronounced among women. Traditionally, older adults are taken care of by their families. A care giving crisis is predicted owing to changing gender roles, employment of women, erosion of traditional family values, and an increasing trend for nuclear families. Given the number of older adults living alone is increasing, with decreased family support and informal caregivers, older adults in India are increasingly caring for themselves.

16.2 Older Adult Education

Older adult education in India can be discussed under two different dimensions – the first, may be along the scope of older adult education in the current scenario, considering the large number of illiterate elders, and, the latter one, is about the importance of the same in the future, given the propensity of India's huge share of uneducated older people by 2050. Currently, 35 million of elders in India are illiterate (World Bank 2014). Various NGOs, religious bodies, senior citizen groups and other organisations could perhaps find meaningful engagement with older adults through various activities. The keen interest evinced by elders in the education of the younger generations is found to translate into an active engagement in higher education, which in the long term will contribute to research, and further national development. No programme of compulsory universal education can bear fruit without the active support and co-operation of older adults or seniors. It is, therefore, imperative that educational facilities should be provided for them.

16.3 Educational Policy

The National Policy on Education (Ministry of Human Resource Development 1986) may be considered to be a landmark in the history of adult education in India, as it widened the scope of adult education, and brought adult literacy to the forefront of educational planning. It articulated for the first time a national commitment to ‘addressing the problem of eradicating adult illiteracy in a time-bound manner with planned, concerted and coordinated efforts.’ The policy also provided impetus to development of a mass approach to eradication of literacy with mass mobilisation and support of divergent sections of society. This became a trend in the late 1980s with various state governments taking active initiatives in expanding adult literacy programmes. Although the new educational policy has highlighted adult literacy and continuing education as an important strategy for basic education, there is apparent neglect of building the sustainable and further expansion of the system of adult education and training with adequate institutional structures, staff and resources. The government’s commitment to adult education and continuing education has continued according to a programmatic mode. The policy has failed to pay satisfactory attention to operationalize continuing education and lifelong learning including older adult education. The two flagship programmes of total literacy and post literacy (as part of the internationally recognized National Literacy Mission, NLM), on a deeper analysis, reveal that the NLM activities are generally aimed at those adult populations who missed primary education, and generally ignored older people, who are mostly illiterate. To evolve the necessary will and vision to take it to this next dimension poses a tremendous challenge. Yet this task would no doubt be of relevance considering the burgeoning older population as we approach the 2020s.

16.4 The National Policy on Older Persons

The National Policy on Older Persons (NPOP) was announced by the Government of India in the year 1999. It was a step in the right direction in pursuance of the UN General Assembly Resolution 47/5 to observe 1999 as International Year of Older Persons and in keeping with the assurances to older persons as envisioned by the Constitution of India. The well-being of older adults (senior citizens) is mandated in the Constitution of India by Article 41, that states that “... the state shall, within the limits of its economic capacity and development, make effective provision for securing the right to public assistance in cases of old age”. This has been subject to the most elaborate and loosest of translations over the years often aimed at the lofty ideals as envisaged by international treaties, designed at the behest of developed nations.

The National Policy for Older Persons (Government of India 2011) particularly addresses the needs, concerns and issues of older persons, especially focusing on those who are poor and destitute. The policy endeavours to encourage and support continuing education programmes which would cover a wide spectrum of topics ranging from career development to creative use of leisure, appreciation of art, culture and social heritage and imparting skills in community work and welfare activities. Support from Open Universities will be sought to design educational packages using distance learning mode and techniques. The policy also hints about the accessibility of older persons to libraries of universities, research institutions and cultural centres. The programmes admissible under the scheme of Integrated Programme for Older Persons (Government of India 2008) even include 'Running of Multi Service Centres for Older Persons to provide day-care, educational and entertainment opportunities, healthcare, companionship to a minimum number of 50 older persons'.

16.5 The Relevance of Adult Education to India

Adult education in India is the process through which education is provided to adults including older people who, somehow, had failed to receive the elementary education during their childhood. The effort of providing adult education in India has been in existence for many years. This movement has gained momentum with the introduction of Literacy Missions in every state to engage in the implementation of adult literacy programmes to address the needs of the marginalized. The necessity to adjust to the prerequisites of a knowledge-based society and a buoyant economy brought about the need for lifelong learning for all in India, including 90 million who are senior citizens. However, as of now, there are no specific educational programmes and schemes specifically designed for senior citizens, in the manner envisaged in the West. They have been included under the marginalized section, both in adult education schemes and lifelong learning programmes. Along with this, a large proportion of senior citizens are dumped after their productive ages in the name of 'retirement'. Often it is quoted as the end of productive life. The example shown by West can be adopted and thus the under-used section of population can be brought to the spotlight and further contribute to a nation's development. Very few employers or organisations are now thinking about incorporating older adults into their businesses or service sector, so that their experiences can be utilised optimally.

16.6 Literacy, Higher Education and Older Adults

David Willetts, Minister of State for Universities and Science for the UK Government, who recently accompanied Prime Minister David Cameron in India, urged workers older than 60 to give further education serious consideration. He mentioned that for older persons there is certainly a pressure for continuing to get retrained and reskilled, and that higher education has an economic

benefit in that if you stay up to date with knowledge and skills you are more employable (The Daily Telegraph, 18th April, 2014).

As revealed by the National Sample Survey Organisation (NSSO, 2004) employment-unemployment survey, only 50 % of older men and 20 % of women aged 60 years or more were literate through formal schooling in India. In rural areas the proportion was even lower at 42 % among men and 12 % among older women. However, there is no denying the fact that literacy levels among older males and females have improved over time in both rural and urban areas. Among major states, the overall literacy rate among persons aged 60 years and above was less than 25 % in J & K, Rajasthan while it was 65 % or more in Delhi, Kerala. (A person in India is considered literate if he/she can both read and write with understanding in any language). It is not necessary that a person who is literate should have received a formal education or should have passed a minimal educational standard.

Considering India's demographic transition in the near future the higher education of older adult seems to be a promising and priority topic. The Government should conceptualise long term programmes and commit to addressing this future issue. David Willett's observation must be considered seriously for a country like India, where the education of older adults is essential for the holistic development of the nation.

16.7 Open and Distance Learning Programmes (ODL)

Although the existing size and the share of the open and distance education system in higher education is significant, it is still too small to support life-long learning for senior citizens of India.

Interestingly, older adult education is in the spotlight of a few Indian cities as elders are enrolling themselves in courses ranging from ancient history, geography, language, religion, literature and even IT courses. Hyderabad has recently joined the league of a few other cities in the country like Mumbai, Delhi and Allahabad, which have courses for their senior citizens. Under the banner of the University of the Third Age (U3A), third age learning is proving popular in India as abroad – in UK, USA, Singapore and Australia. It has taken root in India too, where there is an Indian Society for the U3A. These programmes are initiated by associations of senior citizens, walkers' clubs, Bajan Mandals (religious groups) and NGOs connected with older adults' educational needs.

16.8 Issues Facing India in Relation to Older Adult Education

Education for older persons in India is considered a priority only after a raft of other services such as health, economic and social security. It was only in 2007 that the Government of India put forward the idea of expanding the scope of the Continuing

Education Programme by developing it as the Lifelong Education and Awareness Programme (LEAP). In probability, this was partly influenced by the global discourse on lifelong learning and partly due to the socio economic changes taking place in the country.

Barriers for older adult education include that adult learners have many responsibilities that must be balanced against the demands of learning. Because of these responsibilities, adults may have barriers against participating in learning. Some of these barriers include (a) lack of time, (b) lack of confidence, (c) lack of information about opportunities to learn, (d) scheduling problems, (e) lack of motivation (Lieb 1991). If learners do not see the need for a change in behaviour or knowledge, a barrier exists. Likewise, if learners cannot apply learning to their past experiential or educational situations, the teacher is likely to have barriers to overcome. A successful strategy usually includes showing adult learners the relationship between knowledge/skill and expected positive outcomes (Brundage and MacKeracher 1980).

In India, demographic and cultural barriers are another issue which seem to be an obstacle for older adult education. Among demographic barriers, age itself is first in the list. Age, with its accompanying responsibilities, complicates decisions about lifelong learning participation, especially for people in their late 50s and early 60s, who often carry multiple family and work obligations. This group may also be dealing with illness of their own or a family member's, care-giving for children and/or grandchildren. These constraints are even more likely to surface for older adults who have both lower levels of education and income (AARP 2014).

Race and ethnicity also present barriers to engagement in higher education, particularly for minorities. They often experience poor health and inadequate medical care throughout their lives. In addition to health issues, older minorities also have lower levels of income, educational attainment, and work-force participation. Until issues related to health, income, and earlier educational opportunities are addressed, lifelong learning options will continue to lag for older minorities (Lamdin and Fugate 1997).

The rural elderly in India remain productive in work more than that of urban elderly as they are involved in sustaining agriculture. However, convincing them to understand about the need of continuing education is very difficult. Conventional education seems of little worth for them; instead, they need health and financial education to help them in their daily lives. The employability of older adults is little discussed in India. Thus, retirement seems to function as a boundary of an individual to remain 'productive'.

A sudden shift in demography can keep any policy makers in turmoil. For the next few decades India will remain young. Inevitably, these resourceful decades will be followed by decades where India's population will shift to the concerns of seniors. This shift can turn to be a burden if India fails to manage its societal needs. Indian society will remain resourceful if the citizens are kept productive, irrespective of their age.

16.9 The Future of Older Adult/Learning in India

The 12th five year plan of India is relatively optimistic about the future of older adult learning in India. It seems that the Government and non-government bodies are catching on to the value and outcomes of older adult education which are widespread and observable trends in the West. The major focus in the Twelfth Plan will be the consolidation, expansion and strengthening of the various programmes into comprehensive coordinated systems to fulfil the aspirations of the vulnerable sections of society (especially senior citizens). It emphasizes the need to revise the Integrated Programme for Older Person (IPOP) 1992 with more provision for education and meaningful engagement of older people (inter-generational learning).

16.10 Recommendations

Older adults are a treasure to our society. They are experienced in various walks of life but many elders have been subject to impoverished living conditions. There is a dire need for 'the elderly' to be looked after with care and warmth, and education is a very significant vehicle to help achieve this objective. We need 'successful ageing' as well as 'productive ageing'. If our brain is idle we tend to age more. One should not be upset about life after retirement; rather this life should be lived fully, aged gracefully and needs to be perceived, in part at least, as an extended leisure time for learning more. Moreover, there is always room for improvement when it comes to learning new things and new skills.

Education opportunities are abundant in India yet the elderly need to be part of this trend and be educated to advantage. Non-Governmental Organisations can play a vital role in advocacy and in formation of older adult groups for better access to services and schemes. States like Kerala, Punjab, Himachal Pradesh (high dependency rates) with high populations of older adults living alone must contemplate their education, training and information needs as a high priority. This can be done through the involvement of local NGOs, State Universities, and religious bodies.

Information and educational material especially relevant to the lives of older people must be developed and disseminated extensively using mass media and non-formal communication channels. Discrimination, if any, against older persons from availing opportunities for education, training and orientation must be minimized, and, as far as possible, be removed.

Open Universities can come up with packages using distance learning techniques and e-learning facilities. The University Grants Commission (UGC) necessarily needs to revise the rules and regulations to facilitate access of older persons to libraries of universities, research institutions and cultural centres. Barefoot College models (see below) may be replicated in different rural and urban pockets of India, to maximise a macro level impact. In order to develop an elder-friendly educational and social environment in India, we must support interactions with educational institutions which will be facilitated by professionally qualified and knowledgeable

senior citizens especially in science, arts, environment, socio-cultural heritage, sports and other areas that could give space for interaction with children and young persons. Schools must be encouraged and assisted to develop out-reach programmes for interacting with older persons on a regular basis, participating in the running of senior citizens centres to develop appropriate activities in them. Individuals of all ages, families and communities should be provided with information about the ageing process and changing roles, responsibilities and relationships at different stages of the life-course. The contributions of older persons inside the household and outside must be highlighted through the media and other forums and negative images, myths and stereotypes need to be dispelled.

After having worked on the review committee for National Policy for Older Persons in 2011, Dr. Mohini Giri came in touch with various experts who had worked on the subject of older people in India. She has compiled their views and insights on the state of India's older population, especially women, in the book, *The Status of Elderly Women in India* (2013). The 2011 review of the National Policy for Older Persons called for a stronger implementation of the Maintenance Act of 2007. It also recommended the involvement of *Panchayat* and block development officers (BDOs) in the welfare of 'the elderly' in rural areas, places from where the productive, young population leaves for urban areas in search of work, often leaving older generations behind unsupported.

16.11 A Contemporary Success Story: India's Barefoot College

The Barefoot College, established in Tilonia village in North India, is a private institution imparting training to village-level illiterate and semi-literate women in various fields. It is undertaking Solar Electrification projects in several inaccessible villages around the world. The Barefoot College selects the illiterate and semi-literate grandmothers and elderly women for training in India. After completion of their training, these women return to their villages as competent, confident Solar Engineers. With the equipment kit provided, they are able to electrify the whole village of around 100 houses. This model illustrates how understanding older persons and linking them with a community need can make them productive and engaged. Not only basic, but in-depth education to address the community need may be needed.

16.12 Conclusion

Evidently, in India, Older Persons' Adult Learning (OPAL) is yet to catch up. Various policies are biased in favour of the younger generations, with little or no attention focussed on senior citizens. Unfortunately, it was only after 2007 that the Government of India began paying attention to older persons' in the mode of Lifelong Learning

(LLL). Nevertheless, absence of confidence in the present system, lack of motivation, ignorance, absence of primary education, ethnicity and minority status, a sense of impotence coupled with the perception of ageing as time for “disengagement,” all operate as barriers to learning. Added to this list, computer literacy is a major impediment, but presents an opportunity given the flexibility that comes with information technology, and its potential to change perspectives. Shifting demographics in India with ageing happening both at ‘the apex and the bottom’ of the population structure have created a compulsion to create avenues for lifelong learning among the senior citizens. There is an increasing realisation of the need to capitalise on the wisdom and accumulated experience of senior citizens in kindling the fire of development and change. Lifelong learning, especially Older Persons’ Adult Learning, holds great promise.

References

- AARP Survey on Lifelong Learning – AARP. (n.d.). AARP. Retrieved August 1, 2014, from <http://www.aarp.org/personal-growth/life-long-learning/info-2000/aresearch-import-490.html>
- Brundage, D. H., & MacKeracher, D. (1980). *Adult learning principles and their application to program planning*. Toronto: Ontario Ministry of Education.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life a handbook on older adult learning*. Rotterdam: Sense Publishers.
- Giri, V. (2013). *Status of elderly women in India: A review*. New Delhi: Gyan Publishing House.
- Gol [Government of India]. (2008). *Integrated programme for older person revised, ministry of social justice & empowerment*. New Delhi. Retrieved July 30, 2014, from <http://socialjustice.nic.in/hindi/pdf/ipop.pdf>
- Gol [Government of India]. (2011). *National policy for older person (2011)*. Retrieved July 30, 2014, from <http://socialjustice.nic.in/pdf/dnpsc.pdf>
- Helpage India. (2013). *Global AgeWatch Index 2013: Insight report, summary and methodology*. Retrieved August 1, 2014, from <http://www.helpage.org/global-agewatch/reports/global-agewatch-index-2013-insight-report-summary-and-methodology>
- Lamdin, L., & Fugate, M. (1997). *Elder learning: New frontier in an aging society*. Washington, DC: American Council on Education.
- Lieb, S. (1991). *Principles of adult learning, Phoenix, AZ: Vision – South Mountain Community College*. Retrieved August 1, 2014, from http://www.lindenwood.edu/education/andragogy/andragogy/2011/Lieb_1991.pdf
- Ministry of Human Resource Development, Government of India. (1986). *National policy on education, 1986*. New Delhi: Department of Education.
- National Sample Survey Office, (GOI). (2008). *Employment & unemployment and migration survey: NSS 64th Round: July 2007 – June 2008*. Retrieved August 1, 2014, from <http://mail.mospi.gov.in/index.php/catalog/123/download/1420>
- National Sample Survey Organisation, Ministry of Statistics and Programme Implementation, Government of India. (2004). *Morbidity, healthcare and condition of the aged: NSS 60th round (January to June 2004)*. Retrieved August 12, 2014, from http://mospi.nic.in/rept%20_%20pubn/507_final.pdf
- Population Reference Bureau. (2012). *World population data sheet*. Retrieved August 1, 2014, from http://www.prb.org/pdf12/2012-population-data-sheet_eng.pdf
- Senior citizens line up for distance learning courses. (2013, May 20). *Times of India*, p. 7
- World Bank, Education Statistics. (2014). *India – Literacy – Elderly illiteracy, April 2014*. Retrieved August 1, 2014, from <http://knoema.com/atlas/India/topics/Education/Literacy/Elderly-illiteracy>

Chapter 17

Indonesia

Clara M. Kusharto and Nugroho Abikusno

Population ageing has become a major issue in most of the developing countries including in Indonesia. Currently, more than 10 % of the total population in Indonesia are older persons (60 years and above) and is estimated to be around 24 million persons. Most older persons are women and their proportion increases as they age, especially those above the 80 years age group have quadrupled in numbers (Sri Murtiningsih 2012). They are mostly living in rural areas with no formal education and limited capacity to earn a subsistence livelihood. In the Millennium Development Goals (MDGs) and post MDGs between 2015 and 2019 the issue of poverty, especially among older women, will be approached by the following life course oriented programmes: ensuring adequate nutrition for adolescent girls; mothers in pregnancy receive adequate antenatal care; infants are born with normal birth weight; exclusive breastfeeding given by mothers to their infants, especially in the first 4 months of life; complimentary 12 years primary to intermediate education to school children. Eventually, these initiatives should provide young people sufficient opportunities to enter a competitive work force. During middle age until old age, sufficient job opportunities based on workability criteria and lifelong learning must be available for older persons. The acquisition of these new skills in the form of gerogogic education and training will open opportunities for older persons to develop their second career as a prerequisite for independence and further employment in the older work force (NCOP 2010).

C.M. Kusharto (✉)

Department of Community Nutrition, Faculty of Human Ecology,
Bogor Agricultural University, Bogor 16680, West Java, Indonesia
e-mail: kcl_51@yahoo.co.id

N. Abikusno

Medical Faculty, InResAge Trisakti University, Jakarta, Indonesia
e-mail: nabikusno@yahoo.com

17.1 A History of Adult Education

The Madrid International Plan of Action on Ageing (or its popular acronym MIPAA) in 2002 was declared at the Second World Ageing Summit that followed 20 years after the First World Ageing Summit in Vienna, 1982. Fundamentally there was a paradigm shift from the principle of older homes advocated in 1982 to active ageing and ageing in place. A declaration was signed by representatives of government and older person civil society organizations of 157 countries that deemed older person issues important in their strategic policy and planning in facing the new millennium.

This strategy and its subsequent programmes as addressed in the Shanghai International Strategic Plan that followed organized by UN-ESCAP (UN Economic and Social Commission for Asia and the Pacific) focused on the three pillars of the new active ageing paradigm, namely: (1) older persons' participation in national development; (2) the quality older persons' health and social services, and (3) age-friendly enabling environments for older persons to age in place (Anon 2003). Development of an age-friendly infrastructure not only benefits older people per se but most importantly a wide spectrum of vulnerable groups in the community such as women, children, and the disabled.

Older persons were encouraged by international advocates to remain active and develop a second career after retirement from their former formal occupation and develop a second career as entrepreneur or geropreneur in the non-formal/informal sector. This global commitment to ageing made possible the development of adult education, especially in the community in Indonesia. The retirement age in Indonesia, on average for most professions, according to law, is 56 years. Most of those who retire at this age are middle to senior management and are mostly at the top performance level in their respective careers. Many men who have not prepared for retirement often suffer from post power syndrome and those around the ages of 45–54 often die of premature deaths, mostly due to stroke and heart disease. According to the Burden of Disease in Indonesia based on DALYs (Disability Adjusted Life Years) and mortality in 2010, stroke, ischemic heart disease and diabetes ranked first to third among the top ten diseases with the highest burden on self and family in the country (MOH 2010).

Informally, elders in Indonesia have received adult education at their local integrated posts. These posts are formed at the village level. They originally were established to provide monthly health examinations for seniors in the community by the local community health centre. However, recently they have been integrated with several other public services such as social, population and other local government agency services for seniors in the community (Abikusno 2014).

Recently, pre-retirement training is provided for civil service employees entering retirement age in most government agencies and private companies. The most recent effort was pre-retirement programmes provided by the Ministry of Health for their prospective retirees. The curriculum was designed by the Health Intelligence Centre under the Secretary General of the Ministry of Health, Republic of Indonesia.

The curriculum consisted of healthy lifestyles based on life course approaches, financial management and planning, second career planning and meeting with successful geropreneurs (Abikusno 2013). In the case of second career planning, training was provided by instructors from the Silver College of Bogor Agricultural University (Kusharto 2013). This course on pre-retirement training had been successfully conducted in several provinces in Indonesia.

Gerontological education for the public has been initiated by the National Commission for Older Persons (NCOP), a body under the President of the Republic of Indonesia formed in 2005 by a Presidential decree number 52, 2005. It has produced a guidebook on *Basics of Gerontology and Geriatrics* (Abikusno 2010) prepared by InResAge Trisakti University and distributed to regional commissions in Indonesia. At present there are 32 provinces and more than 200 regencies/cities that have established Regional Commissions for Older Persons (RCOP) in Indonesia.

17.2 The Contribution of Organizations

The National Commission for Older Persons (NCOP) known as *Komisi Nasional Lanjut Usia* (or abbreviated as *Komnas Lansia*) was established in 2004 based on a presidential decree and consists of 25 members representing related government agencies/ministries, such as People's Welfare, Social Affairs, Health, National Population and Family Planning, Empowerment of Women and Child Protection, Transportation, Public Works, Tourism, Manpower, Religious Affairs, and National Education and Culture. Civil society is represented by 10 members consisting of older persons (civil society organizations, academia, and media). The daily management of NCOP Indonesia is handled by a secretariat of the Social Affairs Ministry.

In the National Commission for Older Persons (NCOP) there are three academic institutions that have been elected into it based on their track record in ageing studies and adult education. These academic institutions are: (1) InResAge Trisakti University established in 1998; (2) the Centre for Ageing Studies (CAS) University of Indonesia, established in 2010; and, (3) Silver College Bogor Agricultural University Network established in 2009. Two of the last-mentioned have been facilitated in their establishment by the NCOP while InResAge had been facilitated by the United Nations Population Fund through the Ministry of Population and Family Planning.

The Indonesian Research on Ageing Population (InResAge) Network is coordinated by the Centre for Community Health and Population Studies at Trisakti University Research Institute and had been established in 1998. The current contact person is Associate Professor Dr Nugroho Abikusno. It was formally inaugurated by the Minister of Population and Family Planning and its members represented researchers of member institutions and subsequently individual experts focused on population ageing studies.

Academic institutions that were included in this Network in 1998 were: the Islamic University of North Sumatra Medan, Trisakti University Jakarta, the State

University of Jogjakarta, Airlangga University Surabaya, Udayana University Denpasar and Hasanuddin University Makassar. Most of its senior professors and researchers are presently members or affiliated with the National and Regional Commissions for Older Persons (Ageing) at the central and regional levels. InResAge is also part of a larger network of public health oriented research centres known as the Indonesian Epidemiology Network (or abbreviated as *JEN*). During the great Asian tsunami that struck Aceh and Nias island in 2004 InResAge Jakarta and Medan were involved in action research on needs assessment of older persons in disaster areas in Nias island sponsored by HelpAge International and HelpAge Indonesia (Abikusno 2005).

The Centre for Ageing Studies, the University of Indonesia, whose contact person is Professor Tri Budi W. Rahardjo, was established in 2010 as a multidisciplinary research-based centre that focuses on postgraduate education in ageing. The centre's establishment was facilitated by the NCOP Indonesia and since 2012 has been designated the World Health Organization's (2002) Collaborating Centre on Healthy Ageing by WHO/the South East Asian Regional Office (SEARO).

The Silver College Bogor Agricultural University (SC-IPB) contact person is Professor Dr. Clara M. Kusharto, MSc. It was established in June 6, 2009. It was initiated by the Damandiri Foundation which is headed by Professor Dr. Haryono Soeyono and later continued well supported by the NCOP Indonesia and the National Population and Family Planning Coordinating Board (BKKBN). It is a unit at the University that plans and organizes active ageing activities in the University in coordination with local or national government in support of older persons to assist older person programmes under the National and Regional Commissions for Older Persons (known as *Komnas Lansia* and *Komda Lansia*) (Anon 2009).

The objectives of Silver College are to provide continuing education in ageing, and to promote caring skills for older persons as caregivers at the family and community level. Besides these main objectives, it provides a second chance for potential older persons to remain active, learn and convey their knowledge, and relevant experiences as well as playing a role in their family's welfare and community development. Silver College has been established in many universities in 15 of 33 provinces in Indonesia under a co-operative body of higher education institutions in the field of Food, Nutrition and Community Health which is known as Badan Kerjasama Antar Perguruan Tinggi bidang Pangan, Gizi dan Kesehatan Masyarakat (or abbreviated a *BKS-PGKM*). A working group (*Pokja PGKM*) to oversee Silver College (SC) chapters has been established (by NCOP, 2012–2013) the network of SC-IPB has been established in 20 universities at 10 provinces (West Nusa Tenggara; East Nusa Tenggara; North Sulawesi; Central Sulawesi; Central Kalimantan; South Sumatera; Maluku; Papua; Bali and Jambi) and fully supported by BKKBN (2012) in 16 Universities at five provinces (DKI Jakarta; West Java; Central Java; D.I. Yogyakarta; East Java). These chapters are managed in collaboration with each local RCOPs (*Komda Lansia*) and/or BKKBN at provincial, regency/city level (Kusharto 2012, 2013, 2014).

17.3 Organizations Contributing to Adult Education

Generally, stakeholders involved in adult education in Indonesia can be categorized into governmental, private sector and civil society sectors.

Government agencies are co-ordinated through the NCOP at the central level and via the RCOP at the provincial, regency and city levels. The majority of activities of older persons in the community are located at the village integrated posts (called *Posbindu*). Activities are focused on routine health examinations, morning exercise, social assistance for subsistence, and funding for small enterprises. The last-mentioned is provided by social service, population and local government agencies.

Within the private sector, companies' pre-retirement programmes provide second career training to their soon to retire employees. Even though these companies generally do not provide pensions, they do provide a lump sum severance package and the pre-retirement activity on second career planning greatly assists in their choice of future entrepreneur activities. In general around 10 % of retirees become successful in their second careers. This is similar to regular entrepreneur programmes instituted by government; what is most important in the case of older people is they remain active healthy and productive in their spare time.

In civil society the NCOP and the RCOP promote the establishment of older person groups or clubs in the community. These groups are various and numerous. They may consist of gymnastics groups doing early morning exercises under supervision of a trained instructor; the health services have specific gymnastic exercises for a healthy heart, diabetes, a healthy brain and osteoporosis. Other types of clubs include those associated with religious prayers, dancing (both modern and traditional), discussion clubs and others depending on the group members' interests and expertise. By being active in their daily lives, these older persons in respective groups promote their own members' health, activity and productivity (Abikusno and Kusumaratna 1998).

17.4 Learning Organizations and Relevant Legislation

Law number 13, 1998, on Older Persons' Welfare, is a landmark law that replaced a law on neglected and frail elderly (*Jompo*) with a focus on older persons' social welfare based on the universal rights of older persons (Anon 1991). Presently, the universal rights of older persons are: Rights to (1) freedom from discrimination, (2) freedom from violence, (3) social security, (4) health, (5) work, and (6) ownership of property and inheritance.

Based on this law, a body to co-ordinate various stakeholders concerned with issues related to Older Persons' Welfare was established by presidential decree. This body is known as the National Commission for Older Persons consisting of 25 members representing related agencies and civil society. Government agencies

were represented by people's welfare, health, social affairs, the National Population and Family Planning Coordinating Board (*BKKBN*), women's empowerment and child protection, religious affairs, transportation, public works, tourism and creative economy, and national education. Civil society was represented by older person organizations, academia, and the mass media. Academia is presently represented by InResAge Trisakti University, CAS University of Indonesia and Silver College Bogor Agricultural University (Abikusno 2007).

The InResAge Trisakti University Research Institute The InResAge Trisakti University was established in 1998 and was formerly under the Centre for Community Health and Population Studies (CCHPS) of Trisakti University Research Institute. Since 1997 it has been involved in population based studies related to older person groups in the community; the quality of life and social dimensions of older persons; older persons in disaster situations (in particular, the Indonesian tsunami in 2004); gerontological education for the public; the promotion of healthy lifestyles based on life cycle approaches in the community (in particular, university students at graduate and postgraduate levels); older person groups and/retiree groups; and the quality of life and social issues of individuals and senior groups.

In 1997 the CCHPS studied the characteristics of older person clubs in south Jakarta funded by WHO/SEARO. A research article on this study was published (see Abikusno and Kusumaratna 1998). In 1998 the CCHPS was assigned to facilitate a study on the social cultural profile of older persons in Indonesia funded by the United Nations Population Fund (UNFPA) through BKKBN. The study showed older informants' conceptualized opinions were based mainly on their sociocultural, socioeconomic and sociogeographical backgrounds. This study was later published (Abikusno and Kusumaratna 2002). In the same year Dr Abikusno was also assigned by the UNFPA to facilitate the first edition of the National Plan of Action (NPA) for Older Persons' Welfare and subsequent editions until the present NPA on Older Persons' Welfare period of 2009–2014.

CAS University of Indonesia The Centre for Ageing Studies (CAS) was established on the principle of interdisciplinarity and its vision has been to be internationally recognized using a comprehensive and holistic approach in research, education and consultation services while significantly contributing to health, medical, psychological, social services and technology. Its mission incorporates the study, development and creation of solutions for ageing issues in the areas of medicine, dentistry, nursing, psychology, socio-economic sciences, basic sciences and technology. In addition, it intends to participate in improving the quality of life of an ageing society through the creation of wellness programmes based on research findings.

More specifically, the areas of research and services include medical gerontology (e.g. investigating health and medicine pertaining to ageing), social gerontology (e.g. demography, social participation, communication, social inclusion) and gero-technology (e.g. buildings, housing, transportation, communication and information technology). CAS also collaborates with numerous international agencies such as the International Labour Organization (ILO), the Oxford Institute of Ageing

(UK), the Institute of Southeast Asian Studies (Singapore) and many others to incorporate all the universities in Indonesia and NGOs related to ageing issues (Anon 2014).

The Silver College Bogor Agricultural University The main objective of Silver College is to provide a place or means to communicate and to increase the role and welfare of seniors'/elderly communities. Specific objectives of Silver College are: to conduct identification and assessment of elders' interest in development of family and community; to design curriculum and continuous training to develop capacity for seniors through the concept of life-long learning/education; to design and implementation pilot initiatives to provide capabilities for elders; to provide motivation, guidance and facilitation for seniors in empowerment, especially initiating senior groups through empowerment posts. The dissemination of information, useful experience ("best practices") and activities to increase family and community development is also part of the Silver College's responsibility (Anon 2009).

The Silver College intends that elders will continue learning and be happily active for themselves and for others. The College uses science and knowledge for the benefit of others, preserving local culture to be transferred to the younger generation while maintaining health and activity through group forums.

Within the broad guidelines of Silver College two main programmatic themes are to prepare people to enter retirement (e.g. psychological challenges; mental health and fitness; understanding economic and social affairs; undertaking encore careers) and to provide skills training in areas such as hospitality and professional development (e.g. for lawyers, accountants and the helping professions).

Participants of Silver College can be IPB (Bogor Agricultural University) retirees or those aged 55+ years. They should have a desire and commitment to guide their family and community towards improvement of their health status. In its development Silver College has been accepted as a unit of a university to conduct joint activities with other older person institutions. In the last 5 years, Silver College has programmes both inside and outside of the IPB and it is replicated in many programmes of universities in 15 provinces in Indonesia, known as Silver College chapters.

17.5 Key Concepts and Theoretical Perspectives

There are historical landmarks that have influenced the development of older adults' learning programmes especially in formal education in Indonesia. In the colonial era, most of the Indonesian indigenous people were only allowed to attend elementary school education. Currently, there are still many elderly people from that late colonial era. On the other hand, those of the elite or so-called blue blood (*ningrat*) had been given the opportunity to have higher education, and at present there are still many of them in the community dispersed around the country. More recently, most of the adult population are highly educated in the post-colonial era since Indonesia's independence on August 17th 1945 (Yeniar 2014).

Institutions that contribute to the growth and development of older adult learning organized by government institutions are technically under the Directorate General of Higher Education (*DIKTI*) that has academic programmes to allow Indonesian older adults to enjoy higher education. With this policy, many older persons have graduated from various Master's and PhD. programmes across the country. Older adult education in Indonesia is not a separate or exclusive educational entity. Formal education for the Master's and/ PhD programme is integrated into the mainstream general courses that are open to all students who hold a high school diploma.

Concepts and theoretical perspectives underlying a special education programme for older adults have not been validated or do not formally exist. Therefore, older persons formally take the path of existing Master's and PhD education as a general rule. Engagement in older adult education depends on their own initiative and abilities, including financial independence and cognitive competence. The government has not provided special facilities for them, so formal education for scholars is generally for adults aged less than 40 years, especially for those receiving government scholarships.

The elite community which has benefited from the existing system due to the opportunity provided for further study in adulthood are mostly those lecturers or educators having relatively high financial stability. Groups in the general public such as members in local elder groups do not yet receive the benefits in the form of government scholarships because the cost of Master's and PhD education programmes are very expensive so that access is denied. Further study is also not a requirement for those who do not work in the higher education field.

Master's and PhD programmes are higher education degrees mostly enjoyed by the "elite" within society. The problem for most older persons is the cost required for these education programmes that are considered very expensive and require candidates to focus fulltime on their studies. Education programmes for older adults will evolve in the future or the next decade if the cost can be reduced to make them more affordable for older persons. Further, the financial ability of the community in general has to be increased to make higher education more accessible and affordable for all, especially our senior students.

Adult education in the community, especially for middle to lower social economic status members, has been provided at community posts in the neighbourhood or village level, especially for older persons. These posts are frequently attended by those who are retirees and seniors who come to the posts with their informal caregiver, usually an adult child or relative living in a common home dwelling. These posts provide health, social, population and economic productive opportunities in the form of funding for small to middle enterprises. However, not many providers and volunteers are formally educated in andragogy, let alone gerogogy (Findsen and Formosa 2011). Thus, there is a need for professionals and vocationalists dealing with issues of seniors in the community to be educated in basic communication required to manage older clients in the community.

17.6 Development of Adult Education Assisted by the State

Based on Law number 13, 1998, on Older Persons' Welfare, there are several key elements related to welfare in general and its relationship to adult education. The key elements in Article 11 of this law are to provide services in (1) religious spirituality, (2) health, (3) job opportunities, (4) education and training, (5) accessibility to public facilities, (6) legal assistance, and (7) social assistance.

In this law all elements related to older persons' welfare are overseen in a body that coordinates related stakeholders and is officially guided by a National Plan of Action (NPA) for Older Persons' Welfare for the fiscal period of 2009–2014. During the period of 1999 to 2014 the NPA had been issued by three different agencies namely, Population and Family Planning, Transmigration and Family Planning (Abikusno 2000) and Social Affairs. Since 2003 (Abikusno 2003) the latest version is presently being formulated by the Coordinating Ministry of Peoples Welfare to be issued in the near future. The nine action plans of the NPA fiscal year 2009–2014 are focused on: older persons' institutions; coordination; management of older persons; family and community support; age-friendly health services; older persons' quality of life; older persons' infrastructure and facilities; older persons' education; and international cooperation.

17.7 Who Benefits Most from the Current System?

At present those who benefit from adult education are older persons who wish to learn and develop expertise in a second career. There are many success stories of those who had prepared for their life after retirement such as a government employee who developed a franchise of automobile service branches in the city of Bandung and other similar success stories in the community.

However, those working in the informal sector all their lives, especially in agriculture and commerce, remain in a similar occupation since the day they were born until they die. The majority are living in the subsistence economy and often do not have pensions to rely on. Only 4 % of older persons are covered by pensions and they are mostly retirees from government agencies and the armed forces (military, navy and air force). However, with the enactment of Law 40, 2004, on the National Social Security System (*SJSN*), the Government of Indonesia has integrated the various social security schemes mostly provided to civil service employees and state-owned companies under one umbrella, co-ordinated by the National Social Security Body (*BJSN*). Beginning in 2014, universal coverage in health will be provided for all citizens, including seniors, followed by workers' assurance in 2015.

17.8 Issues and Problems of Sustainability

In lieu of post MDGs 2015–2019, where the focus will be sustainable development, there are two main issues that are strategically important to be addressed related to population and adult education. Knowledge of ageing and life cycle approaches should be taught both formally and informally to individuals/children at the earliest age possible. The government should promote this content in the existing curriculum, both in formal and non-formal education in Indonesia. This policy is most relevant since both the issues of population ageing as well as climate change due to global warming will be priority issues in post MDGs sustainable development programmes both internationally and nationally.

Adult education in Indonesia should be directed to those who have no formal education. The current cohort of older persons are mostly women and of no or low formal education. They mostly work in the informal sector such as agriculture and traditional commerce. As they grow older they often become single parents due to separation with their spouse, mainly caused by death or divorce.

17.9 The Future of Adult Education in the Next Decade (2014–2024)

The establishment of adult learning programmes such as Silver College or other similar programmes should be made available at national and regional provincial, regency and city levels. The standard curriculum should consist of these important elements: Knowledge of basic gerontology as it relates to a life course approach (in the case of seniors on the ageing process); non-communicable diseases, routine health check-ups, vaccinations; healthy lifestyles that include components such as a healthy and well-balanced diet, daily exercise, sleep, meditation, social interaction and cognitive stimulation; financial management, since most older people are women, homeworkers and head of single families; vocational training in specific competencies in the fields of culinary, agriculture, animal husbandry, fishery, cash crops and so on.

17.10 Case Studies of “Successful” Initiatives in Older Adults’ Learning

Home care and day care by HelpAge Indonesia (locally known as *Yayasan Emong Lansia*) in the last decade has been focused on community-based home care developed in cooperation with the Republic of Korea (ROK)/ASEAN community based home care programme in 10 ASEAN countries, including Indonesia. The programme has generated interest in home care and day care by the Ministry of Social

Affairs. At present the Ministry has programmes in 28 provinces, consisting of 256 older homes and 12, 500 clients. Currently curriculum on dementia care for informal caregivers, nurses and general physicians is being developed based on a Japanese model sponsored by the JICA.

Lastly, at the individual level, there are many case examples of older persons on campus who were successful in their further education (Yeniar 2014).

17.11 Conclusion

Older adult education in Indonesia has rapidly developed since the shifting of paradigm for older persons from older homes into active, healthy and productive ageing in the beginning of the new millennium.

Presently, the key issues in adult education in Indonesia are to make knowledge of gerontology and of life course approaches available both in formal and non-formal education curriculum for students at the earliest age possible; and to make vocational and educational programmes accessible for middle aged and retirees for their second career development in courses provided by educational networks, such as Silver College and other similar institutions.

References

- Abikusno, N. (2000). *The national plan of action for older persons\welfare*. Jakarta: RI State Ministry of Transmigration and Population in cooperation with UNFPA.
- Abikusno, N. (2003). *The national plan of action for older persons\welfare guidelines*. Jakarta: RI Ministry of Social Affairs in cooperation with UNFPA and HelpAge International.
- Abikusno, N. (2005). Need assessment of displaced households affected by the Asian tsunami disaster in Nias Island, North Sumatra, Indonesia. *Journal of Epidemiology, Indonesia*, 7(2), 23–32.
- Abikusno, N. (2007, November). *Older population in Indonesia: Trends, issues and policy responses*. Papers in Population Ageing, No. 3, UNFPA.
- Abikusno, N. (2010). *Basics of gerontology and geriatrics*. Jakarta: The National Commission for Older Persons Indonesia.
- Abikusno, N. (2013). Active healthy ageing. In *A guide for retirement, centre for health intelligence* (In Bahasa Indonesia). Jakarta: Ministry of Health, Republic of Indonesia.
- Abikusno, N. (2014). *Country report Indonesia Regional Workshop on Social Welfare and Social Protection for Vulnerable Groups in ASEAN*, 25–28 June, The Bay View, Pattaya.
- Abikusno, N., & Kusumaratna, R. K. (1998). Characteristics of elderly club participants of Tebet health centre, south Jakarta. *Asia Pacific Journal of Clinical Nutrition*, 7(3/4), 320–324.
- Abikusno, N., & Kusumaratna, R. K. (2002). Social cultural aspects of the aged: A case study in Indonesia. *Asia Pacific Journal of Clinical Nutrition*, 11(Suppl), S348–S353.
- Anonymous. (1991). *Principles for older persons*. New York: United Nations.
- Anonymous. (2003). *Emerging issues and developments at the regional level: Emerging social issues*. Bangkok: UN-ESCAP.
- Anonymous. (2009). Silver College Bogor Agricultural University. Naskah Akademik (*Academic Position Paper*), 6 June 2009. P2SDM-IPB bekerjasama dengan Yayasan Damandiri, Jakarta.

- Anonymous. (2014). *CAS University of Indonesia: Vision, mission and goals*. Jakarta: Center for Aging Study. University of Indonesia.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life*. Rotterdam: Sense Publishers.
- Kusharto, C. M. (2012). *Pemberdayaan Lansia, Active Aging dan Peran Silver College. (Empowering older persons, active ageing and role of silver college)*. Bogor: Bogor Agricultural University.
- Kusharto, C. M. (2013). *Kesempatan Kedua untuk Berkarya. (Second career plan)*, Kurikulum dan Modul Pelatihan Prapurnabakti yang Sehat, Mandiri dan Produktif. Pusat Intelegensia Kesehatan. Kementerian Kesehatan. R.I.
- Kusharto, C. M. (2014). *Silver College sebagai Wadah Penggiat Lansia: Peran Perguruan Tinggi dalam Meningkatkan Kesejahteraan Lansia (Silver College as "Entity" for activity of older adult education: The role of higher education)*. Working Paper in Workshop of P2SDM-IPB. 13 March 2014.
- MOH. (2010). *The burden of disease*. Jakarta: Republic of Indonesia, Ministry of Health.
- Murtiningsih, S. (2012). *Older persons: The population profile of Indonesia*. Jakarta: The United Nations Population Fund (UNFPA).
- NCOP. (2010). *Law number 13, 1998, on Older Persons' Welfare*. The National Plan of Action for Older Person Welfare period 2009–2014. Jakarta: Ministry of Social Affairs, Republic of Indonesia.
- WHO. (2002). *Active ageing*. Geneva: World Health Organization.
- Yeniari, I. (2014). *Concepts, theoretical perspectives and case study underlying the special education program for older adults*. Semarang: Aging Research Centre (ARC), Universitas Diponegoro.

Chapter 18

Italy

Elena Luppi

18.1 Introduction

Population ageing in Italian society is exceeding pressing phenomenon. Italy is the European country with the highest life expectancy, and it is the second longest-living nation in the world, after Japan (United Nations 2008). In the past 50 years, the Italian population aged 60-plus has grown from 12 to 24 %, compared to the other European countries whose older population has grown from 14 to 21 %. Italians aged 80-plus, the so-called ‘oldest old’, counted around 5.3 % of the population in the mid-2000s, compared to a European average of 4.5 % (ibid). At the same time, the ratio between generations in all European nations has experienced a rising ageing progression over the past 50 years. This is especially true for Italy, where the past decade registered 127 persons aged 60-plus for every child aged 14 years or less, and with 26 citizens aged 60-plus for every 100 individuals in the 15–64 age cohort (Minguzzi 2003). In Europe, this latter ratio constituted 23–100 (ibid.). Italy is a country marked by great diversity between Northern and Southern regions, and population ageing is no exception (Gesano and Golini 2006). The population aged 60-plus is heavier in the North and Centre Italian regions – 21 % of the total resident population – whilst in the Southern and Island regions the older cohorts register around 18 % (Istat 2009). In addition to geographical differences, poverty remains one of the most important elements of differentiation in life expectancy and population ageing. Studies on death rates show that the risk factors have greatest impact on the population with a lower social and cultural level, thus poorer in resources to protect themselves from these risks (Maccheroni 2009).

E. Luppi (✉)

Department of Education Studies, University of Bologna, Bologna, Italy
e-mail: elena.luppi@unibo.it

Understanding the characteristics of the Italian older population warrants consideration of a further element which has a huge social and cultural, as well as economic, impact – namely, levels of employment, and consequently, of retirement. The rate of activity among the working population aged between 55 and 65 years old is 26.1 % compared to 42.7 % registered in the European average (Eurostat 2011). For several decades, early retirement was a strategy which allowed companies to lighten their employment burden in times of crisis and to create new jobs for young people, as well as protect the trade union rights of older workers. This led to the so called ‘culture of early retirement’ in Italy, a phenomenon that is accepted and supported by both the management and working-class sectors, as well as the public and political institutions (Guillemard and Jolivet 2001). This incident determined diverse working trajectories and a vision of different life projects by older workers (Fondazione Leonardo 2006).

Italy is characterised by a ‘Mediterranean’ welfare model, one feature of which is a predominance of expenditure for pensions compared to expenditure for services. This means that the majority of older Italians receive relatively generous pensions but suffer from a lack of services (Pugliese 2011). At the same time, the phenomenon of population ageing is also accompanied by the ‘feminisation of old age’. In Italy, as in most European nations, around 60 % of the older population are women, as are two thirds of the population aged between 65 and 74, and three quarters of the over-75s (Eurostat 2011). In this respect, it is opportune to briefly analyse this phenomenon by examining those elements that generally had the greatest influence on today’s older women in the construction of their own identity and gender belonging (Butler 1990). A sociological analysis of the generation of older women in Italy identifies at least two elements which have had an impact on the construction of gender identity – namely, historic-political events and family structure one hand, and the welfare model on the other. In historical terms, it is noteworthy to refer to Betty Friedan’s interpretative analysis (1993) that identifies change as an aspect which has impacted the construction of many female identities in the current generation of older women. According to Friedan (ibid.), women’s role in society in the last century has been discontinuous. Indeed, older Italian women, like the rest of their European peers, have lived through some crucial decades in the history of feminism. Friedan stated that today’s generation of older women have, more than their male peers, experienced the change and management of many different roles, to the extent that they have developed a range of characteristics which she identifies as the strengths of female longevity – namely, ‘relation’, ‘interdependence’, ‘change’ and ‘transformation’. Nevertheless, in terms of family roles and the welfare model, it is important to acknowledge that Italy was, and still is, a country characterised by a ‘male breadwinner’ welfare model (Pfau-Effinger 2004). In this model, the welfare state delegates the family to care for the weaker members (children and older persons) by virtue of the traditional division of roles in which the man brings home the income and the woman is the caregiver. This family organisation seems to have an impact on at least two events which today differentiate the paths of male and female ageing, and which are also the first tasks of development in old age: retirement and the phenomenon of the ‘empty nest’ when children leave home (Erickson

et al. 1986). Both of these moments demand re-adaptation, the reconstruction of one's role and self-image, which is much more difficult today for older men. Indeed, the male breadwinners are probably more at risk of crisis when they retire because they have not experienced as many different roles as women have. Moreover, women, who have completely or predominantly, compared to men, covered the role of caregiver, and who often continue to do so (for grandchildren or relatives), have an advantage as they have invested time and effort in social relations, and have broader and more diversified social networks (Amoretti 1989).

18.2 Educational Opportunities for Older Adults

Older adults in Italy can access different kinds of learning activities covering many topics and purposes. On the one hand, one finds educational initiatives that are open to older adults, although initially conceived for younger adults. On the other hand, we find activities specifically designed to meet seniors' learning needs (Cifello and Gerri 1997). Older adults can attend training activities organised by organisations interested in providing courses for acquiring diplomas or continuous education for workers. This first group of learning activities includes high schools for adults, founded in the 1970s, and now called CPIA (Centres for Adult Education) and Vocational Training Centres, centres that are directed and monitored by the Italian Institute for the Development of Workers' Training (ISFOL). Both educational environments do not make a distinction between younger and older adults, as their activities are addressed to workers or unemployed persons in general. Even if the percentages of senior workers are increasing, such continuing education environments do not consider older adults as a special target group, to the extent that their training paths are attended by only 3 % of the people positioned in the 55–65 age cohort (ISFOL 2012).

The intention of this chapter is to focus on the educational environments designed to meet the learning needs occurring during the third age. In order to investigate this wide and rich field we suggest a categorisation following the distinction adopted by the European Commission (1995) in its White Paper *Education and training – Teaching and learning – Towards the learning society*. Herein, one finds three fundamental classifications – namely, the *formal* education settings (intentionally structured places), non-formal educational settings (intentionally educational places which may not have been designed for this purpose), and informal educational settings (unintentionally educational places), adapting it to this specific context. This chapter also considers the classification of educational and self-learning experiences (Demetrio 1997). Aware that we cannot review all educational contexts available to the third age, these models of classification provide several criteria for interpreting the services and contexts offering learning opportunities for older persons.

Third age universities refer to contexts that can be defined as *formal educational* centres, associations that are openly oriented to providing learning activities for the

older population, with an organisational structure for managing courses, conferences, round tables, libraries etc. In Italy there are five organisations which run recognised Third age universities: Unitre (250 branches) (<http://www.unitre.net>), FederUni (250 branches) (<http://www.federuni.it>), Uniauser (120 branches), Cnupi (40 branches) (<http://www.cnupi.it>), and Unieda (34 branches) (<http://www.unieda.it>) (Principi and Lamura 2004). These Universities are scattered throughout Italy, and were established and currently managed by associations and foundations. Third age universities are a special type of ‘popular university’, based on the model of associations founded in Italy between the late 19th and early 20th centuries within the first trade union and political organisations of the workers’ movement. Closed during the Fascist era, after the war they were re-established with the features that distinguish them today. In current times, Third age universities are recognised by the regional governments, and must meet certain economic, teaching requirements, whilst ensuring staff professionalism and continuity of activities. Regional governments partially fund the activities, and membership or a fee is required for each course. Notwithstanding this, Third age universities are autonomous in both financial and teaching terms.

Third age universities set out to promote the dissemination of culture, foster the inclusion of older persons in the social and cultural life of their local communities and provide appropriate responses to the educational and learning needs of citizens. The cultural activities and courses provided by third age universities generally cover a wide range of theoretical subjects and some practical activities (ranging from literature, theatre, visual arts, history, philosophy, psychology, religion, politics, economics, science, computing, foreign languages, music, choir, dance, expressive workshops including painting, embroidery, to restoration). The course catalogues are based on a careful analysis of the characteristics, needs and interests of the local community and the members of each university association. Third Age Universities were founded to respond to the needs of a broad segment of the population known as the ‘young old’ – that is, people who are still active and in good health, generally over 60 (although in this context we may often meet people in the over 50–55 age group) who tend to consider themselves ‘older adults’ merely because they are retired. These contexts are however open to the whole population, and often the user group may include people in working age, and in some cases even young people who are interested in the subjects. Over the past few years many Third Age Universities have set the objective of extending their courses also to younger age groups. Older adults attending Third Age Universities generally have an average or average-high socio-cultural level. The course catalogue focuses on contents of knowledge and culture, workshops and practical activities, but the central focus of the courses are humanities, arts, scientific dissemination and to a lesser extent expressive laboratories. Computer literacy and foreign languages are increasingly popular. Third age universities can be found mainly in historical centres, but sometimes the classes may be located in other urban areas; rarely these learning contexts are available in outlying areas.

Based on a similar logic of formal and intentional education, some sports associations run courses and activities targeting older adults, and designed considering the need of this segment of the population, aiming to promote well-being, but more

or less intentionally creating opportunities for socialisation and entertainment. Contrary to all other educational activities, these are used exclusively by older persons.

Another important area of third age education lies in the Community Centres for the Elderly, contexts which we may define as part of informal learning – that is, not specifically oriented to the delivery of learning activities. Rather, aiming to create a place of aggregation, a reference for all activities which respond to the needs of the local older persons, but which are open to all citizens. Founded in the 1970s, these community centres were, in the 1990s, organised in a system of national and regional coordination called ANCESCAO based on principles of participatory democracy (<http://www.ancescao.it>). The association coordinates both the 1,328 centres throughout the country (with 392,000 members overall) and the city allotments which have represented a support for weaker segments of the population since the late nineteenth century and which today represent a way of keeping fit, getting back in touch with nature and a means of support for many older people. Community centres receive some funding from the local authorities and self-fund the rest of their needs through a range of activities run autonomously by their older members. These centres involve pensioners and older people who live alone, allowing them to spend their free time in an active and participatory manner. The centres organise various recreational activities, card games, dancing, theatre, outings and guided tours. Many community centres also organise courses on different subjects, mostly expressive workshops (choir, painting, drawing, reading and writing) or courses to develop specific skills (English language, computing, nutrition, etc.). Many centres have a library and periodically organise conferences open to their members and the whole local community. These centres are attended by many ‘young old’ but also target older persons entering the most fragile phase of the fourth age, to encourage them to keep active and cultivate a rich network of social relations. In particular, during the summer these centres organise activities for older persons who live alone and who stay at home (generally for the over 70–75s) responding to the need for entertainment and socialisation and taking care of most important care needs. These contexts are strongly oriented to fostering opportunities also involving the adult and young population, to promote inter-generational activities allowing older adults to spend time with local young people and adults. To ensure this inter-generational meeting, many community centres organise activities which may offer interest for young people, adults and families. In many cases, the courses run at the centre promote access also to new participants who are not necessarily older adults, offering opportunities for different generations to meet. Many Community Centres for the Elderly run educational activities for schools, offering significant testimonials of recent history (the war, the resistance) or everyday life after the war, also covering topics linked to education to life styles and sustainable consumption in Italy in the early twentieth century, or the city allotments.

Community Centres for the Elderly cover the country in a tight network, and in large cities there is one in every neighbourhood. This vicinity ensures more local participation, producing great differences between one centre and another, depending on the socio-cultural fabric of each and the opportunities available locally. Centres

in more inter-generational neighbourhoods tend to promote the active participation of younger people, while the centres located in areas populated mostly older persons focus their attention more on the needs of this user segment. In neighbourhoods rich in resources and opportunities, Community Centres for the Elderly tend to be more active, because they are often in contact with other associations or public institutions.

Voluntary associations are another important opportunity for many older people to spend their time, which we may consider places of non-formal education and 'self-learning', where activities are not specifically structured for learning but which, more or less directly, offer volunteers opportunities for personal growth, exchange and the acquisition of skills. Older adults involved in voluntary activities enjoy concrete experiences for involvement and active citizenship. The largest voluntary association involving older adults as both users and volunteers across Italy is AUSER (www.auser.it), with 1500 branches, 300,000 members and 40,000 volunteers across the country. This association was founded in 1989 at the initiative of the Italian Pensioners' Union and CGIL, aiming to spread the culture and practice of solidarity. AUSER is a voluntary and social association working to promote active ageing and increase the role of older persons in society. The purposes of AUSER include to (i) fight all forms of social exclusion, (ii) improve the quality of life of older persons, (iii) spread the culture and practice of solidarity and participation, (iv) enhance the experience, skills, creativity and ideas of older persons, and (v) develop inter-generational relations with younger generations based on solidarity and exchange. AUSER volunteers are older persons themselves, but increasingly often they are also younger adults, trained to provide care services (to older persons, persons with disability, children, and other people in conditions of need) or community support services (museum surveillance, protection of the local territory, etc.). Over the past few years this association has worked increasingly to implement inter-generational education projects in order to create opportunities for exchange between older and younger people (Luppi 2012). Generally, voluntary associations are increasingly oriented to running projects focusing on the creation of networks of inter-generational relations, where older and younger people can be both promoters and users, depending on who has needs and who can provide responses. Within these realities we also find, more frequently than other contexts considered, people with special needs, the disabled, fragile older persons who are supported by the voluntary services and become part of these educational contexts. Often, older adults contact these services for support and in turn become volunteers, active people who are able to take care of others in conditions of need. In this way a virtual circle is created, from dependency to the assumption of responsibility and solidarity, authentically promoting citizenship.

There are many opportunities that we may consider as examples of non-formal education, such as those activities which target older persons as users or consumers – for example, holidays for older persons, activities organised by theatres, cinemas (memberships, packages) and so on. Again in the field of 'non formal education', but without any educational intentionality, one should include the means of mass communication. Television in Italy includes some programmes specifically targeting

older adults, which can stimulate them by offering information and entertainment but which may also have a not-necessarily positive influence, particularly when this segment of the population is seen not as a group of citizens but a group of consumers. The issue of the relationship between older persons and television is extremely wide and complex, and space limitations restrict its analysis in this chapter, but it is important to underline that the use that older persons make of the television may be harmful and, to a certain extent, 'anti-educational', when it demands immediate, uncritical and unconditional listening, when it leaves no room for other entertainment or leisure activities. Hence, leading users to adopt passive roles with no involvement or participation.

The Internet may also be considered a multi-faceted non-formal educational context, but here we should underline that this new communication tool has a significant impact on the educational opportunities offered to the third age. The third age universities and community centres for older persons increasingly coordinate computer literacy courses for older persons, aiming to develop the skills of this segment of the population in these new technologies, and therefore, preventing the risks of the digital divide they suffer from. In many cases these courses are run by young or very young people and this form of teaching promotes an authentically profitable inter-generational exchange.

18.3 Future Prospects

Learning opportunities for the third age in Italy are, as this chapter has documented, a multi-faceted world that involves a number of educational fields and many areas of interest. On the basis that the older population is growing in terms of both numbers, and their wealth of knowledge and experiences, there is no doubt that the need for educational initiatives for older persons will increase substantially in the coming future. Political initiatives that recognise the key role of these older persons aged in the 60–74 age cohort aim to promote as well as encourage educational-training options for this group. There is no doubt that older adult education appears to be a fundamental strategy for the promotion of seniors' active citizenship, as well as their participation and inclusion in a society in which the impact of the senior population is becoming increasingly important (De Luigi 2008). However, not everything is positive, and challenges abound. For instance, the avenues where older adults education takes place tend to experience a gender imbalance in the sense that older men are more likely to experience social exclusion compared to women. The Italian situation is similar to that reported for Malta:

The low percentage of older men signals strongly that for some reason [older adult education] is not attractive to them. The [University of the Third Age] is promoted through avenues – such as during health-related programs on the broadcasting media or through leaflets at health-care centers where most of the clients are women. [Older adult education] is, thus, miles away from incorporating courses that are interesting to male lifestyles such as health and cooking programs called Pit Stops and Cooking for Men as is the case in Australia... (Formosa 2012: 123)

However, it is interesting to underline that although women are also more active during later life, are more involved in associations, voluntary work and all collective opportunities which allow them to remain socially dynamic and involved, they also experience specific barriers in their efforts to participate in older adult education. Again, the situation in Italy is similar to the one in Malta:

...one can never overemphasize the double standard of aging – that is, the severe difficulties that older women face as the result of the combination of ageist and sexist prejudices. However, the [Maltese University of the Third Age] overlooks the unique barriers faced by older women such as their low expectations that they can participate successfully in educational pursuits, difficulties reaching learning centers due to inadequate transport amenities (the large majority of older women in Malta do not own a driving license), and problems in finding time for educational pursuits when caring is so time-consuming. Fieldwork located a masculinist discourse within the [Maltese University of the Third Age] where women are generally silenced and made passive through their invisibility. (Formosa 2012: 123)

Indeed, this demonstrates the need for a social policy approach in older adult education, one that is sensitive to gender constructions, which highlights the strengths and limitations of both older men and women, and plans accordingly.

Finally, it is noteworthy that the social and demographic changes taking place in Italy, and the projections these have on future decades, allow us to imagine a society increasingly marked by coexistence between generations. Italy, like many other countries, is experiencing an increasing gap between different generations. Saraceno (2008) describes the Italian family as ‘tighter’ and ‘longer’ to indicate narrower family groups (inter-generational family groups are increasingly rare, and the percentage of four generations of a family living together is the lowest in all of Europe) with less children who live with their parents much longer than in other European countries. Nevertheless generational solidarity represent a coping strategy for facing the economic and social crisis. Younger generations in Italy are very often supported by parents or grandparents. Due to the lack of services, above all those for early childhood and older adults, active older persons often cover very important roles as caregivers for their grandchildren or other relatives in conditions of need. This is why the educational needs of older adults and of the ageing society is moving increasingly more towards the promotion of positive intergenerational relationship. The educational contexts for older adults can play a crucial role in this social and demographic challenge by including the younger generations and promoting opportunities for exchange and dialogue, interacting with other educational establishments (Jarvis 2004). Many educational contexts for older adults are already shaped as intergenerational learning environments, where people can meet and share significant living experiences and solidarity amongst generations and social groups. The potential of older adults education can therefore expand following two main directions: one reaching out to all senior citizens (including the more isolated and the weaker ones due to health issues, social or economic reasons, gender or cultural segregation), and another reaching out to children, young people and adults, in order to build intergenerational solidarity (Formosa 2005, 2011).

References

- Amoretti, G., & Ratti, M. (1989). *Anziani oggi. Condizioni, bisogni, aspettative* [Older adults today. Condition, needs, expectations]. Milan, Italy: Franco Angeli.
- Cifello, S., & Gerri, V. (Eds.). (1997). *Esperienza anziani, un'indagine sociologica condotta sui bisogni e le domande degli anziani nella provincia di Bologna* [The experience of older adults: A sociological survey on the needs of older persons in Bologna]. Milan, Italy: Franco Angeli
- De Luigi, R. (2008). *Divenire anziani, anziani in divenire. Prospettive pedagogiche fra costruzione i senso e promozione di azioni sociali concrete* [Growing senior, the seniors growing. Educational perspectives between sense making and social promotion]. Rome: Aracne editrice.
- Demetrio, D. (1997). *Manuale di educazione degli adulti* [Adult education handbook]. Roma-Bar: Laterza.
- Erickson, E. H., Erickson, J. M., & Kivnick, H. Q. (1986). *Vital involvement in old age*. New York: W.W. Norton.
- European Commission. (1995). *White paper on education and training – Teaching and learning – Towards the learning society*. http://europa.eu/documents/comm/white_papers/pdf/com95_590_en.pdf. Accessed 13 Jan 2014.
- Eurostat. (2011). *Labour force survey*. <http://epp.eurostat.ec.europa.eu>. Accessed 13 Jan 2014.
- Fondazione Leonardo. (2006). *Quarto rapporto sugli anziani in Italia 2004–2005* [Fourth report on older adults in Italy]. Milan: Franco Angeli.
- Formosa, M. (2005). Feminism and critical educational gerontology: An agenda for good practice. *Ageing International*, 30(4), 396–411.
- Formosa, M. (2011). Critical educational gerontology: A third statement of first principles. *International Journal of Education and Ageing*, 2(1), 197–219.
- Formosa, M. (2012). Education and older adults at the University of the Third Age. *Educational Gerontology*, 38(1), 1–13.
- Friedan, B. (1993). *The fountain of age*. New York: Simon & Schuster.
- Gesano, G., & Golini, E. (2006). Generazioni e invecchiamento [Generations and ageing]. In Fondazione Giovanni Agnelli e Gruppo di coordinamento per la demografia (Eds.), *Generazioni, famiglie, migrazioni*. http://www.fga.it/uploads/media/FGA-SIS_-_Generazioni__famiglie__migrazioni.pdf. Accessed 13 Jan 2014.
- Guillemard, A. M., & Jolivet A. (2001). Invecchiamento e occupazione in una cultura del pensionamento anticipato [Ageing and occupation in an early retirement culture]. *L'Assistenza sociale*, 1, 1-2.
- ISFOL. (2012). *XIII Rapporto sulla Formazione Continua 2011–2012* [Report on Continuing Education] <http://sbnlo2.cilea.it/bw5ne2/opac.aspx?WEB=ISFL&IDS=19214>. Accessed 3 Oct 2014.
- ISTAT. (2009). *Sommario di statistiche storiche 1926–1985*; [Statistics compendium 1926–1985] <http://demo.istat.it/bil2009.index.html> and <http://demo.istat.it/ric/index.html>. Accessed 3 Oct 2014.
- Jarvis, P. (2004). *Adult education and lifelong learning: Theory and practice*. London: Routledge Falmer.
- Knowles, M. (1973). *The adult learner. A neglected species*. Houston: Gulf Publishing.
- Lewis, J., & Ostner I. (1994). *Gender and evolution of European social policies*. ZeS- Arbeitspapier, n. 4, Centre for Social Policy Research, University of Bremen.
- Lindeman, E. C. (1961). *The meaning of adult education*. Harvest House: Montreal.
- Lowenthal, M. F. (1972). Transition to empty nest: Crisis, challenge or relief? *Archives of General Psychiatry*, 28(1), 8–14.
- Luppi, E. (2009). Education in old age: An exploratory study. *International Journal of Lifelong Education*, 28(2), 241–276.
- Luppi, E. (2012). Training to intergenerational dialogue and solidarity. *Third Conference of the ESREA Network on Education and Learning of Older Adults Intergenerational Solidarity And Older Adults' Education In Community* ESREA Network on Education and Learning of Older Adults, Filozofske Fakultete Univerze v Ljubljani, 2012, pp. 96–104

- Maccheroni, C., Una stima della speranza di vita per grado di istruzione in Italia all'inizio degli anni 2000 [An estimation of life expectancy compared to education in Italy]. *Polis*, XXXIII, 127–144.
- Minguzzi, P. (2003). *Anziani e servizi, la prospettiva europea e la dimensione nazionale* [Older adults and services: Italian and European perspectives]. Milano: Franco Angeli.
- Ministero dell'Interno della Repubblica Italiana. (2010). *Gli anziani in Italia: Aspetti demografici e sociali ed interventi pubblici stato delle province. Censimento delle strutture per anziani* [Older adults in Italy: Demography, society, public services. Elderly organisations' census]. Italy: Ministero dell'Interno della Repubblica Italiana.
- Naldini, M. (2006). *Le politiche sociali in Europa* [European social policies]. Roma: Carocci
- Orefice, P., & Cunti A. (Eds.) (2005). *Multieda: Dimensioni dell'educare in età adulta: prospettive di ricerca e d'intervento* [Adult education: perspectives on research and action]. Napoli: Liguori
- Pfau-Effinger, B. (2004). Socio-historical paths of the male breadwinner model – An explanation of cross national differences. *The British Journal of Sociology*, 55(3), 377–399.
- Principi, A., & Lamura, G. (2004). *National report on Italy*. Maastricht: Pan European Forum for Education for the Elderly.
- Principi, A., & Lamura, G. (2009). Education for older people in Italy. *Educational Gerontology*, 35(3), 246–259.
- Pugliese, E. (2011). *La terza età. Anziani e società in Italia* [Third age. Older adults and society in Italy]. Bologna: Il Mulino.
- Ripamonti E. (2005). *Anziani e cittadinanza attiva, Imparare per sé impegnarsi con gli altri* [Older Adults and active citizenship, learning for self, committing with the others]. Milano: Unicopli
- Saraceno, C. (2008). Intergenerational relations in families: A micro–macro perspective. In C. Saraceno (Ed.), *Families, ageing and social policies: Intergenerational solidarity in European welfare states* (pp. 1–19). Cheltenham: Edward Elgar.
- Scabini, E. (1985). *L'organizzazione della famiglia tra crisi e sviluppo* [Family organisation between the crisis and the development] Milano: Franco Angeli.
- Schaie, K. W. (1977). Toward a stage theory of adult cognitive development. *Journal of Aging and Adult Development*, 8(2), 129–38.
- Suardi, T. (1993). *Invecchiare al femminile* [Female growing old]. Roma: La Nuova Italia Scientifica
- Tough, A. (1979). *The adult learning projects*. Toronto: Ontario Institute for Studies in Education.
- Tramma, S. (2003). *I nuovi anziani: Storia, memoria e formazione nell'Italia del grande cambiamento* [The new Seniors. History, memory and education during the Italian big change]. Roma: Meltemi Editore.
- United Nations. (2008). *World population prospects: The 2008 revision*. <http://esa.un.org/unpp>. Accessed 3 Oct 2014.

Chapter 19

Japan

Shigeo Hori

Japan is one of the most economically advanced countries in East Asia. Its area size is 377,7930 m² and it is surrounded by the sea. The total population is about 127,515,000 in 2014, but gradually this total population is decreasing (Somusho 2014). Because of her non-colonized history, Japan is a country with the same language, same time zone throughout the nation and mostly homogeneous ethnicity. Traditionally, Japanese people have valued school education very much, so in Japan under a national standardized curriculum, the literacy level is very high. Also, generally, Japanese people respect older generations, and the seniority system and lifetime employment regime in workplaces has functioned well until recently. Now these systems are gradually changing and new types of career are emerging.

Japan is one of the top ranking ageing countries in the world and we are now facing an unprecedented ageing of population and aging-related problems. In Japan, life expectancy was 80.5 for males and 86.8 for females in 2014. The percentage of people in the entire population over 65 was 26.7 % and that of people over 75 was 12.9 % in 2014 (Ministry of Health, Labour and Welfare 2015). The Ministry estimated that in 2035 the proportion of people over 65 will be 33.4 %, which means more than one third of Japanese people will be considered older people (Naikakuho 2013, p. 3). One of the important reasons for Japan's ageing society is the baby-boomers' ageing and they were born between 1947 and 1949 just after the World War II. Compared to other countries, Japanese boomers' (or Dankai Generation's) period is very short, but about eight million people are included in this category (Amano 2001). Japan as a country now faces the boomers' retirement issues, which link to older people's entry into community and learning activities. In a decade or so Japanese boomers will enter into late 70s or the fourth age. This may be going to cause another ageing problem in near future.

S. Hori (✉)

Department of Education, Osaka University of Education, Osaka, Japan
e-mail: horii@cc.osaka-kyoiku.ac.jp

In the work lives of older Japanese workers, generally retirement age is 60 but pension receiving age is 65. So for older workers, a kind of pre-retirement education and sometimes mediating jobs are offered to them. In Japan we have about 1300 employment service centres for older people and about 750,000 people are using this system (Zenkoku Silver Jinzai Jigyō Kyōka 2015). After retirement, some older adults will go for part-time work or volunteer, and/or engage in community activities. As for volunteering activities of older people, examples include storytelling for children in public libraries, acting as guides in museums or sightseeing spots, and caring of children.

In parallel with ageing problems, now we are also in the era of a lifelong learning society. In Japan, however, until around 1990 “social education” was the most popular label associated with the education of adults and older people. But because of the restructuring of the Ministry of Education in 1988 and the enactment of the Lifelong Learning Promotion Law in 1990, the term “lifelong learning” has become the most popular term associated with the education of adults and older people. Since that time the Ministry of Education in Japan has proclaimed the direction of a lifelong learning society. Thus, we are now living simultaneously both in the age of accelerated rapid ageing and in the age of lifelong learning promotion. It is the convergence of these two streams wherein the promotion of older adult education and learning is embedded.

In Japan the promotion of older adult education has been carried out by both the Welfare Policy Stream and the Education Policy Stream. It needs to be acknowledged that in Japan the governance of older adult education is mainly conducted by the Welfare Ministry, not so much by the Education Ministry, since the Education Ministry’s main target is school and young people’s education.

19.1 Historical Background of Older Adult Education in Japan

19.1.1 The Education Stream

Educational opportunities of older adults have been provided by both the education and welfare streams (Hori 2006, 2012). From the viewpoint of educational policy, there is the Basic Act of Education (enacted in 1947) which makes claims for the idea of lifelong learning and the significance of social education. Under this honorable Law, the Social Education Act (enacted in 1949) is the backbone of adult (including older adult) education in Japan. The Social Education Act assumes Kohminkan (Citizen’s Community Learning Centres) to play a central role in (older) adult education in Japan. So traditionally, educational opportunities for older people have been provided in Kohminkan classes or provided in older people’s community groups. Small sized and community based opportunities of learning have been popular and they are still now active, too. Main topics of the older people’s classes include classics, arts, gardening, senior sports, social issues, health issues and so on.

In 1965 the then Ministry of Education began to subsidize Older Adults' Classes in cities and towns. In 1981 the Central Council for Education recommended the national direction of lifelong learning, and in it proposed the enrichment of learning and social participation of older people. In 1989 a subsidy for the opening of Older People's Learning Centres (Chouju Gakuen) of prefectures started. About 20 Learning Centres were opened then. The co-ordination of opportunities for older people's learning within their prefectures is their important mission. But in the 1990s Japan experienced a long term economic depression and subsequent reform of the administrative and financial systems in national and local government. Ironically, around the International Year of Older People in 1999, most of the Learning Centres were downsized or abolished. Currently, there are very few examples of large sized educational centres for older people directly managed by the educational board of local government. This trend has been intensified in the twenty-first century and so it is too within the welfare stream. In many cases, more extensive learning opportunities for older adults were entrusted to Incorporated Foundations, Non-profit Organizations (NPOs) and designated administrators.

19.1.2 The Welfare Stream

From the viewpoint of welfare policy, the Act on Social Welfare on Elders (enacted in 1963) is its backbone. Its purpose is to preserve a healthy life for elders, and it says that older persons and their knowledge and experience should be respected. In 1995 the Basic Act on an Ageing Society was enacted and rudimentary ideas concerning an ageing society and responsibilities of national and local government were introduced. Later, the ideas of lifelong learning and social participation were inserted into the welfare policy of Japan. In 2001 the General Political Guidelines for an Ageing Society was passed via a Cabinet Decision and within the formation of a lifelong learning society these guidelines were incorporated as an essential part of welfare policy.

One of the more sensational trends in welfare policy was the health and welfare promotion plan for elders in 1990. In line with these plans, "the National Longevity Development Centre" and "the Organization for Promotion of Long Life" were created and these organizations have founded and managed the Prefectural, Large Scale Senior Colleges.

In 1997, the Long-Term Care Insurance Act was enacted and from 2000 the Long Term Care Insurance System was introduced. These proclaimed national and social support for the care needed for older people. In 2005 the system of Community Comprehensive Supporting Centres was introduced and these played the central role for community welfare and community care prevention. According to the Care Prevention Manual in 2012, the care prevention project has three levels of prevention; its primary prevention is the health promotion project for "healthy" older people. Traditionally, welfare programmes for older people have been practiced as the protection of socially deprived people. But from around 2000, "the construction of a participatory ageing society" proclaimed by the Japanese Welfare Ministry

provided new direction. Social participation and lifelong learning activities of “healthy” older people were incorporated into this “care prevention” project. Thus, the rationale for lifelong learning activities as welfare activities for “healthy” older people was created (Hori 2012).

19.2 Successful Initiatives of Older Adult Education in Japan

In Japan, there are several successful initiatives in the area of older adult education. Some of them are based in an educational stream, some are in a welfare stream, but recently private sector level educational opportunities for older people are mushrooming. Because of the tight financial budget of the Japanese Government, increasingly older people themselves are establishing the NPOs or new organizations and managing older people’s learning activities. In many cases, the local government’s Lifelong Learning section coordinates these organizations and groups.

19.2.1 Kohminkan Classes for Seniors: A Typical Example from the Education Stream

A typical example of facilitating older adult education in Japan are the Kohminkan senior classes in every community. Most of Kohminkan classes are targeted at older adults under the label of Senior College, Senior Classes. In larger cities or prefectures, there are Lifelong Learning Centres and they also consist of Seniors’ Classes or Colleges. Most of the classes entail the ideas of older adults’ health promotion, social network making, and community participation through learning.

One successful practice for older adult education in Kohminkan is the Sakura City Senior College in Chiba Prefecture. This is a 4 year college with four levels/ domains of learning for each year; Meeting, Talking, Deepening, and Mutual Learning (Hori 2012). In the fourth year or a Mutual Learning Level, class members invite other class members to teach them what they have learned in the last 3 years. In the following week, the invited class members invite the previous hosts to their class as a return teaching class. Thus, changing the roles of learners and teachers as a reciprocal venture (peer learning) is the rule in this system.

19.2.2 Large Scale Senior Colleges in the Welfare Stream: Inamino Gakuen Senior College

A typical example of learning opportunities of older adults in the local government welfare stream is the Senior College, mentioned above. In response to the Care Prevention Plan, the Organization for Promotion of Long Life was founded in all

prefectures and most of them possess large scale senior colleges. Imanino Gakuen Senior College in Hyogo Prefecture is one pioneering example of this school-type college for older adults in Japan. This was formally opened in 1969 and then it was managed by the Board of Education in Hyogo Prefecture. But now it is managed by the Association for the Creation of Life Meaning in Hyogo Prefecture, a third sector organization which belongs to the welfare stream. This is a 4 year senior college (1 year of 340 60+ students) with classes in gardening, health and welfare, culture, pottery and the liberal arts. This College also has a 2 year graduate course with 50 student capacity, and a Radio Learning Course with 500 students capacity. This College has its own campus established solely for older adult education.

19.2.3 Senior Targeted Entrance Exams for Older Adults in Traditional Universities

Since about 2005, Japanese traditional universities have adopted a senior targeted entrance examination, mostly aimed at students over 50 years old. Unlike the historical background of the University of the Third Age in European countries, the conditions of senior targeted universities in Japan were rather different. Because of the downsizing of the number of youngsters, some universities in Japan needed some strategies for filling the capacity of their students. One idea was to open the university learning opportunities to seniors.

In 2001 Hiroshima University adopted the system of the Phoenix Entrance Exam, namely, an entrance exam for seniors. Since then, some universities have adopted this type of entrance exam, some targeted at graduate school level, some targeted to seniors' learning linked to tourism, and so on. Currently, there are two types of senior classes in traditional universities in Japan, namely, the integrated type and the (senior) segregated type. The former accepts seniors to the university under the same conditions as young students. They are required to collect the credits for graduation, including physical exercise and the study of a foreign language. The segregated type has a special class for seniors, so the materials, instruction methods and curricula are different from the traditional students' ones. Now the most popular form is the combination of these two types, which means there are three types of classes (a traditional students' class, a senior class and a mixed class). Most of the mixed classes are usually introductory and attract comparatively large numbers.

One of the successful initiatives of senior classes in a traditional university is the case of Sonoda Gakuen Women's University (Hyogo Prefecture). This university has three classes (History, Global Culture, Information Science; total students capacity is 110) targeted mainly to senior students (defined as 50+). After the graduation from these classes, students can become "senior research students," and they can continue their class attendance. More than 300 "senior research students" are studying at this campus. However, senior students are separated from traditional female students' classes; they can use the University Library and the Students' Hall, so they are also enjoying the atmosphere of campus life.

19.2.4 NPO Osaka Senior College

In 2008 Osaka Prefecture Senior College was closed mainly because of Osaka Prefecture's financial plight. However, in 2009 the founding members of the College established a new NPO called NPO Osaka Prefecture Senior College in Osaka City. In 2014 this College has 68 classes with more than 2,000 students. Besides regular classes, many activities have been added. Among them are classroom meetings, study circle activities, social contribution activities, and discussion classes. This is an NPO managed by senior people themselves as volunteers. Since this College is totally managed by senior citizens, new ideas for older adult learning facilitation from older people themselves are included in its management practices. For example, this is exemplified by the fact that no age and geographical barriers exist which means potentially everybody can join in the class if the classroom capacity allows. The curriculum is based on senior people's interests and learning needs. So, for example, in the 2014 curriculum, 12 history classes and seven painting classes were opened. The rationale behind the Senior College operation is the promotion of health, enrichment of friendship ties, social participation and a social contribution through learning (NPO Osaka Senior College 2013).

19.2.5 Library Services for Older Adults

Corresponding with an ageing society, public libraries are trying to adopt the ideas and practices of senior services. Traditionally, senior services in the libraries have been welfare-oriented ones. For example, the provision of physical accommodation in relation to slopes, lights, chairs, and large-size-lettered books. But recently new ideas and practices in the area of library senior services are emerging. For instance, in the Shimane Prefecture, a life review room in one rural area library was opened and it was an archive room consisting of community history. In that room storytelling about community life and intergenerational activities are practiced. In another instance, city library services that have been modified as longer staying type facilities, function as a comfortable place for older library users. This type of "library" is actually a part of a park, forest, shopping centre, community facility, so the older people can stroll around these areas. From this perspective, a library is not only a place of composite facilities, but also a place of learning, relaxation and comfort.

Considering older people's situation in Japan, there are two sharp differences between contemporary older adults and the ones in former days. One difference is that the number of what we call "healthy seniors" is increasing and the national survey says this rate is about 80 % or so (Naikaku 2013). Another difference is that now the number of what we call the "old-old" or people in the fourth age is increasing (Naikaku 2013). This means that "healthy," rather active older people are the main target of educational initiatives in Japan now, but in a decade or so, education in the fourth age will become an urgent issue. In those days, what can education and learning do for care-needed elderly will become a serious matter in Japan.

19.3 Rationale for a New Meaning of Education for Older Adults

As we have witnessed above, coupled with the unprecedented ageing wave of Japanese society, new initiatives for older adult education are emerging. So in this age what is the educational rationale for facilitating older adult education? And also we have to ask whose responsibility is it.

Formerly welfare interventions were targeted to the people who needed support and protection. Older people are one of the prime targets, so as a part of health promotion, welfare based learning or recreation is one important area of welfare policy. On the other hand, educational endeavours for older adults were principally targeted at rather healthy oldsters and they were provided mainly in the community learning centres. Today in Japan, educational interventions towards healthy older people are provided from the welfare stream under the name of “care prevention.” Of course, learning issues of older people have very strong ties to welfare, health promotion and care prevention. But is there any unique dynamism or role in learning/education per se in contrast to welfare rooted education in this age in Japan? There is little realization that a mere extension of education of school days is enough. New assumptions about education and learning are needed if the role of education from a new viewpoint of lifelong learning is to be taken seriously. Perspectives towards older adults are changing and they are triggered by the appearance of emergent older generations who have new lifestyles and value systems. They have no war experiences and instead have experiences of higher education and economic growth. Their newer lifestyles challenge old age myths of homogeneity and decrepitude (Findsen 2005).

One hint for this transformational thinking, as McClusky (1973) mentioned some years ago, the essence of education of older people is “an affirmative enterprise resulting in positive outcomes” (Peterson 1990, p. 10). This view was supported further by Hiemstra (1998). Rehabilitation and medical care can achieve it partially. School type education can achieve it partially. But lifelong learning can achieve it more directly and meaningfully. Behind the idea of lifelong learning of older adults, the redefinition of the idea and social conception of ageing is important. Terms such as “anti-ageing” or “the ageing problem” are used prevalently in Japan. But the message of the 2007 National Conference on Positive Aging in Eckerd College, Florida, connected with deep seated emotions concerning ageing and learning; “Positive changes that occur because of aging, not in spite of aging” (Eckerd College 2007). So instead of using the rather negative concepts of ageing, we’d better use terms such as “positive ageing,” “active ageing” or “creative ageing.” The use of such affirmative terms itself can contribute to the empowerment of older people (Cusack and Thompson 2003).

19.4 Issues in the Promotion of Older Adult Education in Japan

Since Japan is a top ranking ageing country, several issues need to be discussed for the future older adult education in Japan. Many adjacent countries with fast-moving ageing populations (for example, Taiwan and South Korea) are looking to Japan for some leadership in managing the lives of older people. One important topic is education in the fourth age. In Western countries and countries in Oceania, education for older adults is provided mainly to seniors of the third age (Laslett 1989). Hence, the University of the Third Age is prevalent now (Hori and Cusack 2006). But what about the next stage: the fourth age? Is it necessary to provide educational opportunities to people in the fourth age (Tornstam 2005)? According to Jarvis, facilitating the learning of fourth age people needs special attention because of physical disability (Jarvis 2001). So distance education and learning via ICT tools may be effective for these people. Assuming familiarity with new technology, using life history and reminiscence methods, people's learning about dementia and death are important.

The second point is that we have to eradicate the myths and biases against older people. Most research on older people's lives has been obtained through medical and/or rehabilitation lens. This has established a strong deficit notion of older age. Very few studies in Japan are conducted through an education and learning lens. The realities of very active old people are sometimes excluded because these realities are usually outside of a medical lens. On the other hand, an education lens sometimes emphasizes the positive aspects of learning so much, with less attention on negative aspects of ageing. A balanced perspective of older people's lives and education is needed in which the desires and demands of older people in both the third and fourth ages are acknowledged and better addressed.

The third is that we need new curricula for older adult education. Traditionally, the learning curriculum for older people included the classics, literature, gardening, simple exercise, welfare related topics and so on based on the idea of a liberal education. But there is now a new type of older person with new lifestyles with increased life expectancy. In this sense, there is a need to develop new materials that are suitable to "new oldsters". Importantly, new curricula should be developed predominantly by older people for older people (Findsen and Formosa 2011). In addition, we need to develop new methods to teaching-learning, including the use of ICT.

Previously, I have commented on older learners' learning needs having two streams and appearing to be paradoxical (Hori 2012). One stream consists of "survival needs" (akin to McClusky's 1973, coping needs), and among them are reading, writing, computing, health and medical issues, economics, legal matters and household issues. Given that many older people are tackling living problems, learning about these life-related issues is indispensable (Knowles 1980). On the other hand, another stream relates to "self-transcendence needs," and among them are the

arts, classics, history, religion, and the humanities. The existential uniqueness of older people's lives is symbolized in relation to closeness to the finiteness of life (Erikson and Erikson 1997; Hori 2006). So, the ultimate need of older people to overcome this finitude of life may be to learn something "eternal". Survival and transcendence (or contemplating the eternal), could make older people's learning needs as essentially paradoxical.

Contemporary ageing issues are an unexploited new topic in our human history, particularly those in top ranking ageing countries, including Japan. Though traditional learning practices have been embedded in older people's lives, we are facing a new era of unprecedented ageing in this society in terms of its sheer size and diversity. In this sense, we have to experiment with new ideas and ways to challenge pervading ageing conceptions and practices and to collaborate locally and globally to create a new meaning of ageing in the twenty-first century.

References

- Amano, M. (Ed.). (2001). *Dankai Sedai: Shinron (Japanese baby boomers, new version)*. Tokyo: Yuushindo Publishing Company.
- Cusack, S., & Thompson, W. (2003). *Mental fitness for life: 7 steps to healthy aging*. Toronto: Key Porter Books.
- Eckerd College Homepage. (2007). <http://www.eckerd.edu/news/index.php?f=detail&id=2242>. Accessed 29 July 2014.
- Erikson, E. H., & Erikson, J. M. (1997). *The life cycle completed* (Expanded ed.). New York: W.W. Norton.
- Findsen, B. (2005). *Learning later*. Malabar: Krieger Publishing.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Rotterdam: Sense Publishers.
- Hiemstra, R. (1998). From where have we come? The first twenty-five years of educational gerontology. In J. C. Fisher & M. A. Wolf (Eds.), *Using learning to meet the challenges of older adulthood* (pp. 5–14). San Francisco: Jossey-Bass.
- Hori, S. (Ed.). (2006). *Kyouikurounengaku no Tenkai (Recent Development of Educational Gerontology)*. Tokyo: Gakubunsha Publishing Company.
- Hori, S. (Ed.). (2012). *Kyouikurounengaku to Kouweisha Gakushu (Educational Gerontology and Learning of Older People)*. Tokyo: Gakubunsha Publishing Company.
- Hori, S., & Cusack, S. (2006). Third age education in Canada and Japan: Attitudes toward aging and participation in learning. *Educational Gerontology*, 32(6), 463–481.
- Jarvis, P. (2001). *Learning in later life*. London: Kogan Page.
- Knowles, M. S. (1980). *The modern practice of adult education: From pedagogy to andragogy*. Cambridge: The Adult Education Company.
- Laslett, P. (1989). *A fresh map of life: The emergence of the third age*. London: Weidenfeld & Nicholson.
- McClusky, H. Y. (1973). Co-Chairman's Statement. In White House Conference on Aging (Ed.), *Toward a national policy on aging* (Final Report, Vol. II, 1971, White House Conference on Aging, p.2). U.S. Government Printing Office.
- Ministry of Health, Labour and Welfare Homepage. (2015). <http://www.mhlw.go.jp/toukei/saikin/hw/life/life14/>. Accessed 23 October 2015.

- Naikaku (Ed.). (2013). *Kourei Shakai Hakusho (Census on aging society in Japan)*. Tokyo: Zaimusho.
- NPO Osaka Senior College. (2013). *A Brochure for 2014 Curriculum*. Osaka.
- Peterson, D. A. (1990). A history of the education of older people. In R. N. Sherron & D. B. Lumsden (Eds.), *Introduction to educational gerontology* (3rd ed., pp. 1–21). Washington, DC: Hemisphere.
- Somusho (Ed.). (2014). *Nihon No Tokei (Statistics of Japan)*. Tokyo: Somusho.
- Tornstam, L. (2005). *Gerotranscendence: A developmental theory of positive aging*. New York: Springer.
- Zenkoku Silver Jinzai Jigyo Kyokai (National Silver Human Resources Center Association) Homepage. (2015). http://www.zsjc.or.jp/toukei/list_page. Accessed 23 October 2015.

Chapter 20

Kenya

Florida Amakobe Karani and David Macharia

Kenya is in East Africa, lying across the equator along a 536 km (333 miles) coastline on the Indian Ocean. The total mass surface area is 580,367 km² (224,960 square miles). The land rises westwards from the low lying, warm and humid Coastal Plain where the port of Mombasa is located, through savannah plateau, to the cool, temperate Central Highlands at between 1500 and 3000 m (5000–10,000 feet) above sea level; the highest point is Mt. Kenya at 5199 m (17,058 feet). The Great Rift Valley cuts through the highlands. Nairobi city, Kenya's capital, is also located in this region. The moist Western Plateau surrounds the Kenyan section of Lake Victoria. Northern Kenya is plain, arid and semi-arid. Most of Kenya's population resides in the climatic favorable coastal, highlands and lake regions. Northern Kenya is sparsely populated.

The 2009 census results delineate Kenya's population to encompass 42 African tribes and a small proportion of non-African ethnic groups (including Europeans, Arabs, Indians and miscellaneous others) at 38,610,097 with a projected annual growth rate of 2.7 %. The older adult age group (65 plus) is 1.332 million (3.5 %–730,000 males and 602,000 females). The rural population is 26,122,722 million (67.7 %). The urban population is 12,487,375 million (Republic of Kenya 2009). African older adults live in both rural and urban areas. The non-African older adults live mostly in urban areas.

F.A. Karani (✉)

Department of Educational Studies, University of Nairobi, Nairobi, Kenya
e-mail: karaniflo@gmail.com

D. Macharia

Department of Distance Studies, University of Nairobi, Nairobi, Kenya
e-mail: davidmacharia39@hotmail.com

Kenya's diverse groups live in interrelationship as one country with English as the official language and Kiswahili as the national language. Kenya is predominantly a Christian country, a Christian Missionary heritage to which the country also owes its Western education.

The disintegration of the traditional extended family support system of some African families which leaves their old people destitute, has led to the growth of charitable old peoples' homes dating back to the 1960s which take in some homeless African older people. High cost retirement homes dating back to the 1980s grew out of the need for a home for Kenyans of Caucasian origin who have lived all or most of their lives in the country. These seniors are no longer able to sustain their homes and their families have moved abroad. This issue is discussed later in this chapter.

Amongst concerns highlighted when the census results were announced on 31st August 2010 was "the need to invest in education to meet the demands of the growing school population" (Republic of Kenya 2010, p. 36), but was silent on the learning needs of the age 65 plus.

20.1 An Historical Perspective

20.1.1 From Indigenous to Western Dimensions of (Older) Adult

Older adult learning/education in Kenya is part of the country's transformation process from traditional, through colonialism to independence. In traditional Kenya, education functioned as the vehicle for enculturation in the process of which traditional roles were learned, mastered and performed. Older adult learning was the culmination of learning commenced at birth through adolescence into adulthood.

European missionary influence in Africa dating back to the fifteenth century preceded the colonial onset from the nineteenth to the early twentieth century, during which period European colonial powers scrambled for and acquired colonies in Africa. The British declared Kenya its colony in 1920. Both the colonial Government and Christian missions used rudimentary Western type education to prepare a few indigenous people to undertake subsidiary roles in the colony and to spread Christianity. Initially, adults dispensing responsibilities in their communities were targeted as it took a shorter time and minimal resources preparing them for new responsibilities. The education curriculum consisted of the 3Rs (Reading, Writing and Arithmetic), the bible, agriculture, industrial and technical education, carpentry and masonry. Successful learners were assigned roles as teachers, clerks, chiefs, catechists and so on. Limited formal education was at the same time implemented for younger people. Colonialism and missionary work set in motion change in the African 'space'. Western education, practice and concepts and concomitant

socio-economic governance systems began to take root as mainstream. Western education became the relevant means of preparing people for meaningful participation in the evolving economy, thus thrusting most of indigenous education into obsolescence. Later in this chapter indigenous education is further discussed.

Notwithstanding the gradual taking root of Western education as mainstream, at independence in 1963, a vast proportion of the population was yet to be reached. Emphasis was placed on the expansion of formal education, but a significant proportion of the population was still not affected. Government recognized early the need to expand access by supporting adult education as well, through enacting appropriate Acts, policies and decrees discussed next.

20.2 Adult and Continuing Education: Acts, Policies and Providers

The Kenyan Government's support for the education of adults is evidenced in the series of Acts, policies and decree enacted since independence in 1963. Due to its diverse nature and practice, adult and continuing education in Kenya is aligned to policies in various Government ministries. The over 11 policies link adult education to economic productivity and concomitant socio-economic enhancement of the learner in the economically active broad age group 15/16 to 64. The few policies which make reference to older adults include: the 9th Development Plan 2002–2008 which *inter alia* stresses the importance of designing appropriate capacity building programmes for all organizations; addressing older persons' issues and mainstreaming ageing issues to the national development planning and budgeting process. The Kenya Constitution 2010 provides for full participation of older adults in the affairs of society to enhance their personal development and to ensure that they remain active in society. The Kenya National Policy on Ageing underscores the importance of developing and promoting education and training programmes that respond to the needs of older persons. However, there is a disconnection between the policies and implementation, as stated in the 'Report on Status and Implementation of National Policy on Ageing in Kenya,' that "these policies remain on paper as very little has been done to implement them" (Olum 2009, p. 15) This state of affairs is seen in the way the Government pivotal body in charge of adult education – the Board of Adult Education (BAE) and its implementing arm, the Department of Adult Education (DAE) – are carrying out their work. The BAE was established by Act of Parliament in 1966 (Cap 223), revised in 1967 and in 2012 respectively to develop, coordinate and regulate adult education throughout the country (Republic of Kenya 2012a, b, c). The Act does not provide for statutory authority and financing for day to day functioning. The DAE Director doubles as Secretary during Board meetings, the only visible activity of the Board. The coordination and regulatory mandate remain on paper. Providers manage their programmes as they deem fit within the guidelines of the registering body. Two or so from among those outside

Government get appointed to the Board, where matters relating to adult and continuing education in the country are shared during Board meetings.

The DAE was elevated to departmental status in 1978 by Presidential decree (up from a division established in 1967), a directive to eradicate illiteracy. The DAE was charged with the responsibility for adult education throughout the country. The education focus of the DAE has largely been literacy and post literacy wherein older adults who missed school can gain access. The DAE has been constrained in ability and capacity to meet the diverse learning needs of all adults due to problems including underfunding (Bunyi 2006, p. 12; Ministry of Education 2012, p. 18) and location in different ministries. The DAE's limitations leave vast learning needs of adults unmet, drawing in actors from other government bodies and from outside government.

Examples of provision from other government bodies which relate to older adults include continuing education delivered to adults by some public (and private) universities and tertiary level colleges dating back to the 1990s, discussed later. Also, given the devolved Government commencing 2010, some counties are beginning to take an interest in the needs of older adults, which may in the long run extend to learning. For example, in March 2014, Bomet County in the Rift Valley launched a health cover for the 12,127 older adults in the county aged 70 and above, and has approved a monthly stipend of 2500 Kenyan shillings (approximately US \$30). Providers outside the Government include: Religious Based Organizations (RBOs), Non-Government Organizations (NGOs), Community-Based Organizations (CBOs) and others, discussed later.

20.3 The State of Adult and Continuing Education Related to Older Adults

20.3.1 Adult Literacy Education

Adult education in Kenya grew out of the need to provide education to the vast proportion of the adult population who missed school. Eradication of illiteracy among these adults was the logical starting point; hence, the DAE's main emphasis on literacy education. The presidential decree of 1978 to eradicate illiteracy backed up by the National Literacy Campaign gave such powerful impetus to the programme that the 1979 enrolment stood at an impressive 415,000 learners (DAE). When the political push became less visible, enrolments declined to 147,393 in 1990; 93,903 in 2000; 126, 174 in 2007 (DAE 1990 & 1994, Economic Survey, 1998–2007). Despite the decline, the post literacy programme was introduced in the 1990s. The integrating of learning to read, write and numeracy with appropriate knowledge and skills in such areas as health, family planning, nutrition, agriculture,

the environment, income generation, was for the purpose of linking education to the social, economic, political and cultural context of the communities and to enhance the sustenance of acquired literacy and numeracy skills. It was assumed that as greater numbers of younger people accessed formal education, the illiterates would be largely older people. Adult education has thus been perceived as literacy education, and education for uneducated older people.

Cheptoo's (2011, p. 56) study of an adult class at Marigat in Rift Valley Province found that education was viewed as for the 'poor and aged'. In practice, this perception is not supported by statistics. For example, the age of the 5252 learners in adult literacy programmes in Nairobi County in 2014 ranges from 18 to 42 (Nairobi County 2014). Older adults are not represented. This should be viewed as a problem of a lack of interest rather than absence of the need for literacy education among older adults. The 2007 literacy survey shows that in the age group 65–69, and 70 plus only 27.7 % and 10.6 % respectively had minimum mastery level in literacy. In addition, 7.8 million or 38.5 % of Kenya's adults have not acquired minimum literacy level (Republic of Kenya 2007, p. 30). This should be seen within the context of extreme disparities between the seven provinces where, for example, the Nairobi Province literacy level stands at 87.1 %, compared to the North Eastern Province which stands at 8.0 %. Thus, adult literacy education (older adults included) remains unfinished uphill business that needs to remain high on the development agenda.

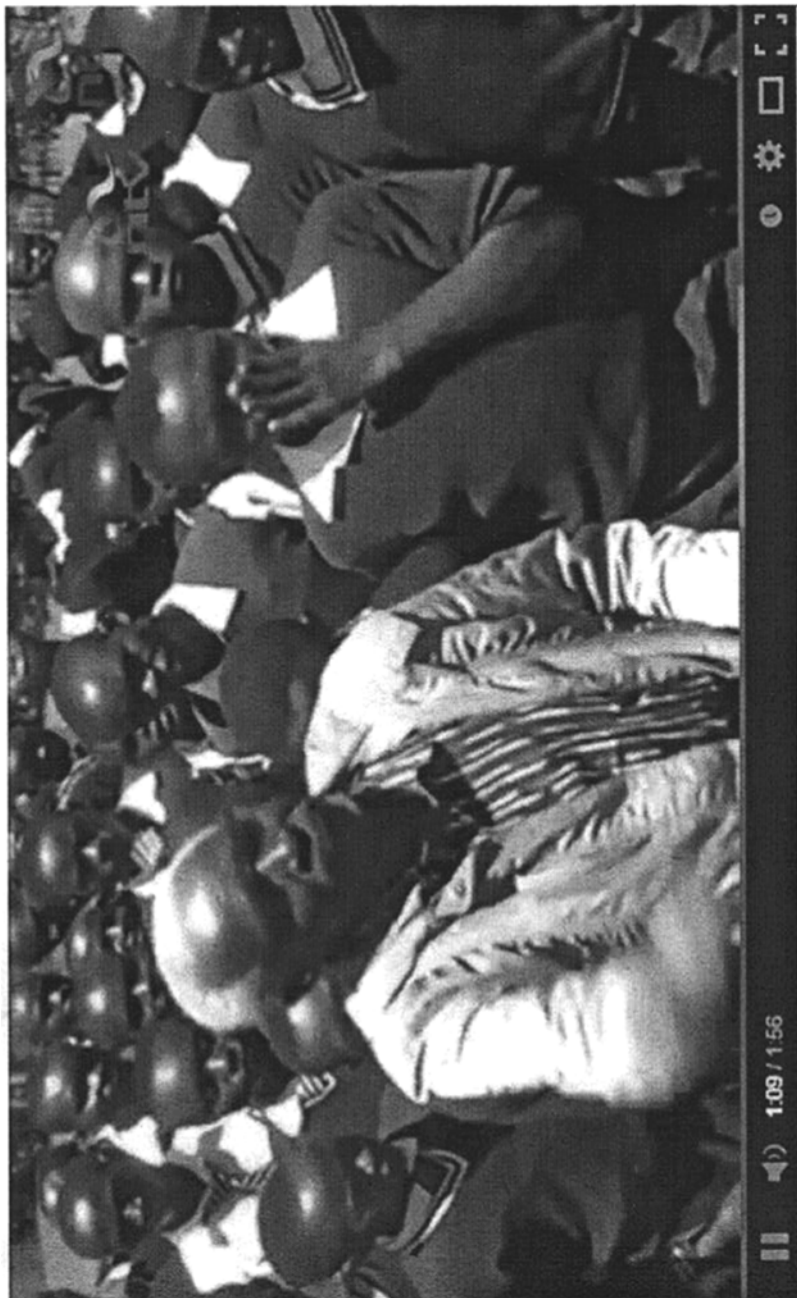
20.4 Basic Education

20.4.1 *Non-formal Education: Offering Primary and Secondary Education Curriculum to Older Adults*

Provision of basic education offering primary and secondary education curriculum outside the formal education system grew out of a learning need of children, youth and adults, left out of school, seeking formal education qualifications. Older adults who missed school can access this education. Among those providing the education are the DAE, CBOs, NGOs and various private initiatives. Centres set up for the purpose vary in makeup. Many of them are ephemeral in nature. An example of such a centre for adults is the Kenya Certificate of Secondary Education (KCSE) Extra Mural Class of the University of Nairobi, in Kangema, a rural station in Muranga County, Central Kenya. In February/March 2014, the class had 12 learners, five males and seven females, ranging in age from 21 to 50 years. Older adults are not represented in this example, yet there are those who have opted not to participate in literacy or non-formal classes in their communities, but have instead enrolled in primary or high school, alongside children and adolescents who can pass as their grand or great grandchildren.

20.4.2 Self-Directed Access to Primary and High School

Perhaps the absence of policy guidelines for older adults' learning explains situations whereby some older people in search for knowledge have enrolled in primary or high school. The introduction of free primary school in Kenya in 2003 opened doors to massive enrolment of children who had either dropped out of school or had never enrolled due to lack of finance. Some older adults who had missed school took advantage of free primary education and enrolled. One such example is Kimani Murage, who enrolled in grade one at the age of 84. This earned him a place in the Guinness Book of World Records as the oldest person to start school. He was described as a committed student. He wanted to learn to read the bible. Murage remained in school despite being displaced during the 2007/2008 post-election violence, until 2009 when he passed away (Kimenyi 2012). In addition to Murage, Rufinas arap Too of Kuresoi North Constituency in the Rift Valley province, also took advantage of the free primary education and enrolled in grade one in 2003. Despite opposition from his wife, he did not give up and proceeded to high school which he completed in 2013 at the age of 79 with grade E. As his school celebrated his completion, it was evident that the poor grade did not matter; what was important was the experience impacted on the school and the community. He had been a disciplined student and environmental captain instrumental in planting many trees around the school. He expects to practise his herbal trade from an educated point of view drawing from the knowledge acquired, especially from the science subjects.



KCSE RESULTS 2013: 79 year old man receives his KCSE re...

<https://www.youtube.com/watch?v=atztLJRYKOK>, March 5, 2014

20.5 University/Tertiary Based Education for Adults

In this section, it is seen that the move away from an elitist to the expanded university model in Kenya, beginning in the 1980s, opened doors to qualified continuing education adults in a cross section of University programmes. This opportunity extends to older adults motivated to access programmes relevant to their interests.

20.5.1 Historical Perspective: The Beginnings of Adults' Access to University-Based Education

Adult education was insignificant in the elitist system of higher education during the colonial and early independence period. Adults' access to University based education in Kenya is traced to the Oxford University Extra Mural model transplanted to Ghana and Nigeria in 1947, from where the practice spread to other Anglophone African countries, including Kenya. Extra-mural programmes consisted of non-credit short courses and public lectures in society, economics and governance. Based at University, the strategy entailed spreading the education far and wide to towns and environs inculcating in adults socio-economic and governance principles that were consistent with colonial Government ideals, to create a favourable environment for colonial governance. The nationalist movements which sprung up in African countries during the same period is evidence that education was a double edged sword, which also created in Africans awareness of the colonial injustices and was one of the factors that led to the fight against colonialism.

Extra-mural studies were initially organized in Kenya from Makerere University in Uganda, then the only University catering for the East Africa region. At independence in 1963, the studies were transferred to University College of Nairobi (now the University of Nairobi, the only University in the country until the 1980s, and is today one of the 67 public and private universities in the country), and merged with ongoing residential and correspondence studies forming the Institute of Adult Studies (today, the College of Education and External Studies (CEES) of the University of Nairobi). Courses in social studies continued to be offered to adults working in and outside Government. The purpose of the studies was to equip learners with skills to facilitate their effective functioning in their respective roles in independent Kenya. This proved to be a temporary strategy as learners' aspirations gravitated towards education that led to formal qualifications as a means to socio-economic enhancement.

20.5.2 Continuing Higher Education for Adults

From 1986, the University of Nairobi, the initiator of University based adult education, also pioneered the offering of continuing higher education to adults, today offered by most of the 67 universities. The opening of university doors to paying but

Table 20.1 Trends in continuing education programmes and enrolment at the University of Nairobi between 2006/2007 and 2012/2013

	Year	Year
Course	2006/2007	2012/2013
Diplomas and certificates	0	3902
Undergraduate courses	16,623	29,014
Post graduate courses	0	13,623
Total	16,623	46,610

Source: University of Nairobi Enterprise Services Ltd

qualified continuing education adults in the cross-section of formal University programmes and new ones (organized around the regular programmes and delivered through diverse alternative, innovative approaches, bringing the education within reach of the learners), makes it possible for adults of all ages to pursue university education, while they continue with work, family and community responsibilities. The trend over the past 2 years as demonstrated at the University of Nairobi has been a rapid growth both in the fields of study and enrolments (See Table 20.1).

Flexibility is a key attribute which can operate in diverse ways, including to open access to women. For example, a study of 200 women from Masaba North District of Kenya, who successfully completed the Bachelor of Education (Arts) programme at the University of Nairobi through distance learning, found that the favourable delivery mode made their participation possible (Mogoma 2012). But as can be seen in Tables 20.4 and 20.5, women are still under-represented as their age advances and according to the educational hierarchy.

20.6 Age Statistics of Some Continuing Education Programmes at the University of Nairobi, including Extra Mural Classes, at Kangema (Tables 20.2, 20.3, 20.4, and 20.5)

From examples of enrolments in some diploma, undergraduate and postgraduate programmes in the academic year 2012/2013, learners’ age range from 20 to 60, and the modal category is 21–50 though the number in the 51–60 cohort is quite strong (see Tables 20.2, 20.3, 20.4, and 20.5). It is evident from the analysis that the age cohort 60 plus is very small. Nevertheless, it demonstrates that there are some highly motivated older adults within continuing higher education. An example is:

G.G. Kariuki a veteran Kenyan politician aged seventy six..... pursuing a PhD in International Relations at the University of Nairobi. Asked why he was doing this, he replied, ‘There is no reason really. I have been doing a lot of sports... and after scaling down all this, I now find myself with a lot of time... and I am still very energetic’ (Nairobi Saturday Nation, 5th April, 2014)

Participation in university education of G.G. Kariuki and the 51–60 and 60 plus cohorts cited above show that older adults in Kenya can access higher education if

Table 20.2 Diploma in human resources at Kangema 2013/2014

Age	Male	Female	Total
21–30	2	1	3
31–40	3	3	6
41–50	4	6	10
51–60	0	0	0
Over 60	1	0	1

Source: University of Nairobi Enterprise Services Ltd

Table 20.3 Bachelor of arts 2012/2013

Age	Number of participants
Under 20	537
21–29	3667
30–39	605
40–49	174
50–59	52
Over 60	4
Without birth date	953
Total	6062

Source: University of Nairobi Enterprise Services Ltd

Table 20.4 MA in project planning and management 2012/2013

Age	Male	Female
Under 30	5	3
31–40	10	6
41–50	0	2
51–60	5	0
Over 60	0	0
Total	20	11

Source: University of Nairobi Enterprise Services Ltd

Table 20.5 Masters in business administration 2012/2013

Age	Male	Female
Under 20	0	0
21–30	818	529
31–40	1530	586
41–50	81	160
51–60	51	9
Over 60	0	0
Without birth date	549	196
Total	3029	1184

Source: University of Nairobi Enterprise Services Ltd

motivated to do so. This case exemplifies the phenomenon of some older adults, in many parts of the world, who, in this phase of life, may engage in challenging activities or work (such as pursuing a PhD) just for self-fulfillment as opposed to socio-economic enhancement typical of youthful adults (Layzer 2005).

20.7 Traditional Education and Older Adults

The resilience of surviving pockets of traditional education may be attributed to their being deeply rooted in the African philosophy of *ubuntu* (a term from South Africa that denotes a feeling of belonging) shunning individualism, emphasizing respect, sharing, caring for one another, and nurturing the environment and earth for oneself and for generations to come (Macharia 2014).

An example of indigenous older adult education is from the Njuri Ncheke Council of Elders of the Ameru who live on the Eastern slopes of Mt. Kenya and whose roles are initiation education, keeping peace and resolving community conflicts. The education is informal, secretive and exclusively male. Thus, the traditional role of elders is not explicitly as learners, but as custodians, sustainers and transmitters of tradition, a role that faces challenges in the changing political space. For example, the 2010 Constitution rooted in Western type governance, demands that elders' actions do not contravene the Bill of Rights, or be repugnant to justice and morality or be inconsistent with the constitution or any other written law. Hence, the elders are learning to re-engineer their role to remain relevant. The Council has recruited 'well vetted' educated adults to its ranks and is conducting campaigns for the abolition of Female Genital Mutilation (FGM) and cattle rustling among the Ameru and neighbours, practices which they would be preserving in the traditional context. They have also donated land for the establishment of Meru University of Science and Technology (Kirema and Macharia 2014).

20.8 Older People's Homes and Learning

Thogoto (24 kms from Nairobi), the first of the homes for homeless indigenous older people in Kenya, was established 1967 by the South Kiambu Women's Guild Presbyterian Council, as a centre for feeding older people who had survived the ravages of the 1950s Emergency, but were rendered homeless. It soon became a home to provide a permanent solution-taking for homeless old people. Currently, the home is housing 31 older people, the oldest case is a female 108 years old (Gaturu 2014). There is great demand for social housing and the vision is to expand to be able to take in up to 200–300 older people from all over Kenya. Similar homes include Kitale, Mundika, Ngong, Athi River, Mombasa, Kisumu, Kangundo and Kitui (www.oldagehome.org/kenya.html.21.2014.4.05pm). Daily activities at Thogoto in which participation is optional, depending on one's interest and strength,

include weaving and basketry, fellowship, counseling sessions, watching TV and participation in the homes' upkeep chores. These may be seen as impacting on participants individually to sustain them physically, mentally and spiritually. The ongoing sustenance and upkeep activities in these homes are largely the work of charity.

The high cost homes mostly accommodate older people of Caucasian origin who pay for the facility, but as years go by, it is becoming apparent that a few locals are likely to opt for such homes made possible with savings accumulated during their active years. Examples include Kilulu in Mombasa from 1997, Fairseat Retirement Home in Rosslyn in the outskirts of Nairobi, Charles Disney Memorial Home in Muthaiga, Nairobi from 1989, and Harrison House in Nairobi. Daily activities include get-together events where they interact with each other, quiz nights, board games, paddling in shallow water, dinners, outings to the stores and salon. These work together helping to create in them an awareness of their self-worth, to find purpose in their fourth age and to remain healthy physically, mentally and spiritually.

20.9 Conclusion

Adult and continuing education in Kenya grew out of the need to provide education to all adults who missed school or who want education beyond their achieved level. As seen above, the age 65 plus, constituting 3.5 % of the population, is a heterogeneous cohort consisting of indigenous older adults who have lived in rural areas all their lives and those retiring to their rural homes, the urban old and poor and non-African older adults largely residing in urban areas. Only a small proportion of older adults have access to learning opportunities. Provision is inadequate, an unsatisfactory trend.

The way forward is to get both state and non-state actors on board, and through advocacy and campaigns to get dormant policies implemented. Both public and private providers need to initiate and implement relevant educational programmes, which should boost ongoing self-directed efforts to sustain activities. Points of care need to be expanded and subsidized to cater for the increasing diverse categories of older people's learning needs. The elders' unique lifetime experiences, especially in African traditional education, can be better tapped, organized and made available to the youth for educational purposes. With all these variables managed flexibly and effectively, the education and learning of older adults should be an asset to the country.

Research in this area is scarce, suggesting perhaps the unattractiveness of the subsector to educational researchers. Moreover, being outside the established formal education system, the subsector is not accommodated within the Ministry of Education statistics. Research and accountability need to be heightened as they are essential tenets for the emergent visibility of the subsector.

References

- Bunyi, G. W. (2006). *Real options for literacy policy and practice in Kenya*. Background paper prepared for the Education for All Global Monitoring Report: 2006 Literacy for life. Nairobi: UNESCO.
- Cheptoo, J. C. (2011). *Determinants of implementation of adult education programmes in Marigat District of Kenya*. A research project report submitted in partial fulfillment of the requirement for the award of the degree of Masters in Adult Education, Nairobi: University of Nairobi.
- Gaturu, J. (2014). Interview conducted on 14th March 2014 with Jane Gaturu, Social Worker in charge of Thogoto Home for the Aged.
- Kimenyi, S. M. (2012). *Free education programs and quality: A tale of two amazing old men*. <http://www.brookings.edu/research/opinions/2012/06/06-free-education-kimenyi>
- Kirema, N., & Macharia, D. (2014). *Resolving conflict using indigenous institutions: A case study of Njuri Ncheke of Ameru, Kenya*. University of Nairobi press.
- Layer, G. (Ed.). (2005). *Closing the equality gap: The impact of widening participation strategies in the UK and USA*. Leicester: NIACE.
- Macharia, D. (2014). *Social change and community development, master's in project planning and management study manual*. Nairobi: University of Nairobi Press. (in press)
- Mogoma, F. (2012). *Distance learning programmes at University of Nairobi*: A research project report submitted in partial fulfillment of the requirement for the award of the degree of Master of Distance Education, University of Nairobi.
- Olum, G. S. (2009). *Report on status and implementation of national policy on ageing in Kenya*. Nairobi: The United Nations Department of Economic and Social Affairs (UNDESA).
- Presidential speech to the Nation on the occasion of Jamhuri Day, 1978.
- Republic of Kenya. (2007). *Kenya national adult literacy survey report*. Nairobi: Kenya National Bureau of Statistics.
- Republic of Kenya. (2009). *Population and housing census*. Nairobi: Government Printers.
- Republic of Kenya. (2010). *The constitution of Kenya*. Nairobi: The National Council for Law, Reporting Judiciary of Kenya.
- Republic of Kenya. (2012a). *Ministry of Education, A policy framework for education, aligning education and training to the Constitution of Kenya 2010 and Kenya Vision 2030 and beyond, Draft April 2012*. Nairobi: Ministry of Education.
- Republic of Kenya. (2012b). *Education for all and decade assessment 2001–2010*. Nairobi: Ministry of Education.
- Republic of Kenya. (2012c). *Laws of Kenya, Board of Adult Education Act, Chapter 223, revised edition 2012 (1967)*. Nairobi: The National Council for Law reporting with authority of the Attorney General. www.Kenyalaw.org

Chapter 21

Lesotho

Julia Preece and David Croome

21.1 African Learning Traditions

African oral traditions for learning have been well documented. Education was holistic, often age related and interactive, drawing from the local environment as a source of knowledge derived from experience and experimentation. Datta (1984) describes how tribal legends and proverbs were used to pass on cultural and context specific knowledge. Story-telling, fables, riddles and proverbs were all sources of learning and introduced to encourage thinking. Kaschula (2001) explains that songs and poetry were used for political education. McWilliam and Kwamena-Poh (1975) point to how Ghana's apprenticeship system would train individuals for professions such as blacksmith, farmer, doctor, priest or herbalist. Young apprentices would start by learning the names of particular tools, sometimes moving between villages to gain broader observational knowledge, followed by learning about the history and culture that encompassed that particular profession in the community context.

The overall goal was embraced by a world view that valued the collective, rather than the individual, such that learning skills, knowledge and understanding were inextricably linked to developing all persons to understand their obligations and responsibilities as community members. Older adults were a primary source of learning and the age of an elder was itself associated with wisdom. Elders were traditionally cared for within the extended family communitarian lifestyle and were seen as educators rather than learners in that context. The rationale was that the

J. Preece (✉)

Adult and Community Education, Durban University of Technology,
Pietermaritzburg, South Africa
e-mail: juliap@dut.ac.za

D. Croome

National University of Lesotho, Roma, Lesotho
e-mail: dr.croome@nul.ls

elders' role of moulding the youth of tomorrow would keep them alert as they taught traditional knowledge systems and wisdoms, while the extended family structure would cater for their physiological and economic needs in their declining years.

21.2 Lesotho

Lesotho, a small, landlocked country that is surrounded by South Africa, still reflects many of those communitarian traditions, described above, although the colonial years that affected the continent as a whole infiltrated into Lesotho during the early 1800s in a way that would significantly disrupt its traditional education system. Christian missionaries selectively introduced literacy classes for the purpose of disseminating religion in 1833 (Lephoto et al. 1996). Lesotho became a British protectorate in 1867 and then a British colony in 1884. It formally gained independence from colonial rule in 1966, at which point literacy levels were below 35 % (Lephoto et al. 2000).

According to the Population Ageing Report (Lesotho Bureau of Statistics 2012a) those age 60 years or older constitute 7.8 % of the total population and 86 % of older people live in rural areas. Seventy percent of the total population is still rural, surviving primarily on subsistence farming. Although the situation is slowly changing, there is a long tradition of male Lesotho citizens (Basotho) travelling to South Africa's mines for work while women remain behind as household heads, farmers of household lands and boys are expected to herd the family's cattle. Officially 60 % of Basotho live below the World Bank's poverty line of \$1.50 per day (World Bank 2012).

Free primary education was introduced in the year 2000, and the adult literacy rate is now calculated at approximately 87 % (Lesotho Bureau of Statistics 2012b), relatively high for the continent as a whole. Although only 2 % of school learners reached tertiary education in 2004 (Government of Lesotho 2004) the National University of Lesotho, between 2004 and 2012, had tripled its output of students with a higher education qualification (National University of Lesotho 2012).

Lesotho has the third highest HIV prevalence rate in the world. The World Bank (2012) reveals that 67 % of all orphans in the country are related to parental death from AIDS. With a population of just under two million, life expectancy at birth has dropped to 41 years. Maternal mortality is amongst the highest in Sub Saharan Africa. As a result of this pandemic, which primarily affects adults of child bearing age, grandparents often take on their children's caregiver roles in a context where traditional, extended family structures are no longer coping with the added socio-economic demands of caring for the vastly increased numbers of single and double-parent orphans.

This situation produces a number of challenges for older adults who traditionally would have expected to be cared for rather than take on the social and economic requirements of reduced family welfare structures. In addition, the rapid

technological and political changes of the current millennium have created new learning demands that are not part of the elders' indigenous knowledge systems.

21.3 Older Adult Learning in Contemporary Lesotho

In Lesotho there is no specified age that indicates when an adult is 'older'. Grandparents can be anything from age 50 or even younger. The official age at which Basotho receive their monthly government pension (a small stipend of approximately USD \$30 a month at 2013 exchange rates) is 70. The age of retirement in many institutions (for example, the National University of Lesotho) is 65. But for most adults there is no point of retirement. If you are not formally employed, you are working on the land to create a subsistence living. That continues until you are no longer able to wield a hoe.

The numbers of older adults are increasing faster in proportion to the rest of the country's population, particularly in view of the impact of HIV and AIDS on the most productive age group (Croome and Mapetla 2007). But Lesotho generally, in keeping with most of Africa, has a young population, where 38.7 % are under 14 and 56.9 % are between the ages of 15 and 65 (World Bank 2012). In a poorly resourced country such as Lesotho, the sheer scale of educational needs for the majority age groups means that there are few, if any, policies that target the needs of older people. Nevertheless, the Lesotho Government has signed up to the goals of international conventions such as Education for All, and the International Human Rights charter. The government Education Sector Strategic Plan (ESSP) (GOL 2005) highlights lifelong learning amongst its goals, but only in relation to basic education and literacy. Post school-age, state provided education is now primarily to cater for those who were not beneficiaries of the recent introduction of free primary education. Reflecting this focus, the country's Vision 2020 document (Government of Lesotho 2001) highlights the need for equity and to cater for disadvantaged groups in the context of lifelong learning. In Lesotho older adult lifelong learning inevitably includes literacy and basic education.

There is a Government funded non-formal education inspectorate with responsibility for overseeing literacy and post-literacy activities in the government and non-governmental sectors. The two main providers in this respect are the government funded Lesotho Distance Teaching Centre (LDTC) and the Lesotho Association for Non-formal Education (LANFE). The former provides opportunities for all ages to upgrade their school qualifications as well as improve their literacy and vocational skills. The latter, one of the main NGO providers, which offers programmes in more remote areas, is the Lesotho Association for Non-formal Education (LANFE). There is evidence that both these programmes have attracted older adults who may have either returned from working in South Africa's mines or who have been herders all their life and are now in a position to improve their education (Preece and Lekhethe 2009).

The country's main higher education institution, the National University of Lesotho, provides part-time accredited courses, through open and distance learning, in business management, media studies, and adult education. These courses are available for anyone who has some schooling to the level that enables them to complete high school and have passed in English and Mathematics. Participants of all ages are enrolled, including a few over the age of 60. Some academic staff in the institution above the age of 60 are also studying for higher degrees.

In addition, many older adults continue to take part in informal learning by attending *pitsos* (village community gatherings) where public information is often disseminated and issues discussed by the elders. The high rate of church going among older Basotho might also be included as a popular form of learning for older citizens.

21.4 Organisations That Specifically Address the Needs of Older People

There are few organisations that specifically address the needs of older people. In the Register of NGOs in Lesotho published in 2000 there were only two NGOs registered as specifically serving old people. The first, Maseru Women Senior Citizen Association (MWSCA), was a group of retired women who had previously worked as civil servants. They had initially obtained sponsorship from the Kellogg Foundation and Help Age International. But it has remained a small group working mainly amongst women in Maseru, Lesotho's capital. The second organisation, Thusanang (translated as 'helping each other') is supported by staff at the university who have been involved in enhancing the well-being of those older adults who live in villages surrounding the university's main campus for over 40 years. Initially supported by small scale fund raising events, major funds were eventually provided by a Dutch charity, whose members were volunteering at the university. By 2000 Thusanang was assisting about 100 people living in low income households with free food parcels. In 2000 a British volunteer took over the running of Thusanang and small research surveys were undertaken to learn more about its clients.

The only legislation in place that specifically addresses older adults is the State Old Age Pension (hereafter referred to as the 'pension') that was introduced in November 2004 (Croome and Mapetla 2007). The object was to take the 75,000 older people who would qualify for the pension out of poverty and repay them for the unpaid and unpensioned work that had been done for their households, families and communities when they were younger. Despite the urgings of the World Bank and the 2002 UN Madrid International Plan of Action on Ageing, including financial support, the Lesotho Pension has never had any funding from any of the United Nations agencies in the country (Croome and Mapetla 2007). The impacts of the pension on adult learning are referred to at many points in this chapter. This pension is a remarkable initiative. Lesotho is one of only two 'Least Developed Countries'

in Africa providing a non-contributory pension. The only conditions are that the recipient is 70 or older, a Lesotho citizen and not in receipt of a public sector occupational pension greater than the pension value. However, in the November 2004 Lesotho parliamentary debate to allow the Government to pay the pension, no speaker mentioned adult education as one of the activities it might support. Some noted that it would help older adults to do more in helping AIDS related orphans and vulnerable children.

Since Lesotho is one of only a handful of African nations which provides a non-contributory, government pension scheme, this phenomenon has attracted some attention from other developing countries which are considering introducing such an income-transfer scheme. Seven African countries and, more recently, Bangladesh, have sent delegations of politicians and civil servants to look at the Lesotho scheme.

Although organizations catering for older adults are few, some research has been undertaken by the university to examine the learning aspirations, experiences and expectations of older adults, partly because of the particular role that grandparents have been forced to play in contemporary society.

21.5 Research into Older Adult Learning

In 2007 there was a National Conference on the Impact of Old-Age Pensions in Lesotho. In the same year the National University of Lesotho published the results of a survey (Croome and Mapetla 2007) on the impact in the Manonyane Community Council area of Roma, where the university's main campus is situated. This survey identified approximately 66 % of pensioners as literate in terms of being able to read and write a letter. Nevertheless only 3 % had been educated beyond primary school and only six of the 215 respondents in the sample of 800 claimed to have any form of professional qualification (two nurses, four teachers) (p. 27).

The average age was 77 and 68 % were identified as head of a household. Only 30 % were living alone or with one other adult or dependent child. Of the 215 respondents in the survey, 65 were caring for orphan children. Twenty percent of the pension was dedicated to this responsibility, including paying for the children's educational needs such as books, uniforms and fees. 'There was no interest from pensioners in using pension for educating themselves' (Croome and Mapetla 2007, p. viii), though most pensioners felt they were still regarded as 'advice givers' (p. viii).

In 2007 a further study of the impacts of the pension in a remote mountain area found that the pension money was being used to pay school fees at secondary and high school levels as well as expenses like uniforms and class excursions not covered by free primary education (Croome and Mapetla 2007). It also contributed to significantly reducing hunger. The pension was thought to strengthen the role of the older person in giving advice to children and grandchildren in the household. Interviewees stressed that, according to African tradition, the pension as an allocated personal right, enhanced the older person's status as an educator in the household.

As a follow up to these findings a further, smaller, qualitative study of 50 people was conducted in the peri urban and rural locations around Maseru, Lesotho's capital city (Setoi et al. 2011). The findings from this study established that pensioners are experiencing some sense of loss of their traditional identities as preservers of culture and sources of learning for the young. In modern, urban Lesotho more children watch television and the elders may spend more time alone. In other cases, older people have broader caring responsibilities for orphans. There were sites of interest which had the potential for further learning. Many, for instance, were members of community based organisations such as burial societies and church groups. One mentioned being a member of a self-help group for older citizens which discussed concerns around the upbringing of grandchildren; another had started a small primary school. However, they confirmed the earlier study by Croome and Mapetla which showed that there was little interest in further learning among the pensioners for themselves.

Nevertheless, some identified participation in activities (such as saving schemes and income generation activities) which required ongoing, informal learning and, after reflection, they acknowledged the potential of structured learning opportunities to enhance these activities. The authors of the study highlight the need for older people to find new ways of organising their lives that might more effectively accommodate new family environments and modern technologies in modes where motivation for targeted learning could be nurtured.

The needs for structured learning regarding the care of orphans and vulnerable children (including middle aged siblings experiencing the effects of AIDS and finding their grandmother was the only person left to support them) are harrowing (Preece et al. 2011). The MWSCA has organised self-help education and training for such carers in villages around Maseru (Letsema 2013).

Another non-formal example of one such targeted initiative took place in the Roma Valley, near to the university campus.

21.6 Case Study of a Successful Learning Initiative: Roma Valley Pensioners' Project

The initiative for this pilot project came from one of the authors of this paper (David Croome). The idea is premised on Lesotho's unique situation whereby the country has a network of almost 300 post offices that serve the entire geographical region and population so that almost all Basotho are within travelling distance of a post office. This is because historically, since the 1870s, approximately half of Basotho men would migrate to South Africa's mines and transmit their earnings back to their families through electronic telegraph. So now the local post offices are the pension collection point for all pensioners.

Once a month 400 Basotho pensioners visit the Roma post office over a period of 2 days to collect their pensions. They start arriving at around 8.30 in the morning

and wait patiently in the surrounding grounds of the post office building for up to 2 h for their pension money to arrive. The atmosphere becomes one of a small market place where some people set up impromptu stalls to sell small items, some pensioners bring refreshments to while away the time and most sit around in groups.

In March 2010 an action research project on universities and community engagement was funded by the Association of African Universities via the UK Department for International Development (DfID). David Croome wanted to test the hypothesis that if you present older people with learning that helps them solve their own problems more effectively and within the context of their usual routines for living, the results can be remarkable in terms of stimulating the education of older adults. The researchers agreed to conduct a small scale case study of the monthly pension days at the Roma Post Office and its potential as a learning market place for the waiting pensioners.

A needs analysis was conducted in July 2010 to assess the pensioners' responsiveness to the idea of introducing various learning opportunities, speakers or activities across a range of topics. The pensioners indicated interest in health issues, food production and crime as well as savings or income generation opportunities. There was also anecdotal evidence that some of the older people were struggling with family relationships.

These topics became an adult education syllabus for the next 5 months. The setting for the learning was the grassy field at the back of the Post Office. Across the road is a police station; next door to the post office is the local office of the Roma Agricultural Extension Officer. Five hundred metres away in one direction is a small bank branch, in the other direction is the local cottage hospital. People from these facilities would become facilitators, along with NUL staff and students.

The researchers organised input from the local police station, the faculties of health and agriculture at the university (using staff and students), and a local bank. Students from a university counselling course were invited to provide informal counselling support. As a result of these interventions, the post office grounds were turned into a monthly learning market place for the waiting pensioners until December 2010. A small canopy and some plastic chairs were installed each morning of pension collection day. Some pensioners sat and listened to open air talks, often asking questions or following up certain issues in smaller groups with the facilitator after the talk; others sat nearby or talked to the student counsellors. The talks included a nutrition talk, advice on crime prevention, information on saving schemes and income generation activities. Sometimes handouts in the local language (Sesotho) were provided for further information.

Most months, a small group of students and staff from the university nursing department sat under the canopy to provide health checks for blood pressure and blood sugar levels to a waiting queue of pensioners. The results were recorded and followed up with referrals to the local primary health care services. A total of 310 pensioners were recorded as taking advantage of this facility between August and September alone (Preece et al. 2011).

A demonstration organic keyhole garden (a built-up garden that is designed to be managed in small spaces by people with mobility difficulties) was built over several

weeks on premises adjacent to the post office. All materials used were locally available. The garden contained a central chimney of grasses and ashes within a hessian sack that allowed for slow drainage of recycled water.

21.7 Evaluation of the Case Study

The case study was one of two studies as part of a larger, pan-African research project concerned with university community engagement (Preece 2011). At the end of the pilot phase, pensioners were randomly approached in January to ascertain their experiences and responses to the activities and the way they were organised. Basotho research assistants conducted the interviews in Sesotho and translated the responses into English. The participating students and specialist speakers were also interviewed. Apart from some technical and organisational issues (such as the recommendation that the speakers be given a loud hailer during their talks in view of the open-air nature of the environment), there was overwhelming appreciation of the opportunity to learn and work together for that purpose.

All quoted responses are cited from Preece et al. (2011, pp. 99–106). Students highlighted their own learning, including a greater appreciation of older people and their needs; the community specialists, such as the police officer, reflected on the value of using non-formal structures such as the pension collecting point for imparting and sharing useful information as well as the opportunity to work collectively for this purpose. One university academic commented: ‘I have learned that education is letting people learn where it is convenient’.

The pensioners themselves emphasised they had learned new knowledge and skills:

We are now aware of small businesses that we can start. With regard to keyhole gardens, we can produce vegetables all year round and eat without necessarily going to the shops and buying vegetables. It is also worth mentioning that we were tested for blood pressure and blood sugar. We were advised that we should eat well to keep ourselves healthy. Therefore, with vegetables that we have grown from the keyhole gardens we are able to have a better diet. (Pensioner 1)

In addition to trying to eat more healthily, there were other examples of learning that produced behavioural change, such as one female pensioner who had a poor relationship with her daughter and who reported improved relations after following strategies suggested by the student counsellors.

Furthermore, a number of people commented on the wider community benefits of educating pensioners. Here was one example from a student counsellor:

The wider community has gained in that most of the pensioners are women. We know that when women have been educated they will be able to educate others in the villages where they stay. (Student)

The main concern by all participants, however, was that the case study was a time limited pilot project. Lack of continuity would impact on the extent to which

participants would be able to maximise the benefits of their learning. To this end, some efforts were made to build on the understandings gained from this project. For instance, four keyhole gardens were created for those older people who were identified by the Community Council as in need of this form of assistance. In turn, this activity provided education and training for their communities.

21.8 What Does the Future Look like for Older People's Learning?

The final section of this chapter looks forward to the demographic, social and economic changes that may take place over the next 10–15 years in Lesotho. It concludes that the environment for promoting further education for older citizens may be improving.

Pensioners in Lesotho are currently aged 70 or older and constitute just over 50 % of the total 144,490 of the population defined in the 2006 Lesotho Census as 'elderly' (Lesotho Bureau of Statistics 2012a, b, p. 5 & p. 8). Those aged 60–69 ('young old') contribute just under 50 %, but these figures across Africa are predicted to increase over the next 10 years (Eyetsemitan 2007). It is likely that there will be a staged lowering of the pension age to 65 over time if and when government resources permit. It is also likely that political pressures will force the Government to maintain the real value of the pension.

A recent significant development is the introduction of the public service compulsory pension scheme. This is based on the government contributing half of the pension premium and all public service staff being required to contribute the other half as a compulsory deduction from their salaries (Ministry of Finance and Development Planning 2010).

The new scheme has changed career intentions. Many public service employees such as teachers and health staff will now find it financially more advantageous to continue working and paying into the public service pension scheme until their compulsory retirement at 65.

This is strengthened by changes in policy regarding the remuneration of older civil servants who are willing to study for job-related higher qualifications. For those in professional groups, this has led to a big demand for part-time continuing education, especially amongst those who only have diploma qualifications and now want to get a degree. This will create a significant demand from adults approaching the age where they are counted as 'young old'.

The MWSCA is probably the nearest example of the 'learning active' found so far in Lesotho. Supported by Help Age International it may have the ability to become a focus for the growth of education for the elderly by elders, as currently demonstrated by the training in child care offered to the older carers of orphans and vulnerable children in the villages around Maseru. Some of the increased numbers of better educated and relatively financially well-off elderly may choose to play a

more active role in local or national politics. Others may put their efforts into promoting the educational and social work of their churches.

As the case-study showed, there is also a potential demand for education amongst older people who live in low income households. We have suggested how this demand could be captured by the Adult Education sector if the will and the enthusiasm are there amongst the providers. At the same time we have suggested the possible increases in the number of better educated and financially secure 'young old'. If some of these could be developed and used as Adult Education facilitators, everyone will benefit and Lesotho would be seen as a nation implementing the rights-based provisions of the United Nations and the African Union policies for the financial and social care of older citizens (Africa Commission 2013).

References

- Africa Commission on Human and People's Rights. (2013). *106 resolution on the rights of older persons in Africa*. <http://www.achpr.org/sessions/41st/resolutions/106/>. Accessed 22 Sept 2013.
- Croome, D., & Mapetla, M. (2007). *The impact of the old age pension in Lesotho: Pilot survey results of Manonyane Community Council area, Roma*. Roma: Institute for Southern African Studies.
- Datta, A. (1984). *Education and society: A sociology of African education*. London: Macmillan.
- Eyetsemitan, F. E. (2007). Perception of aging in different cultures. In M. Robinson, W. Novelli, C. Pearson, & L. Norris (Eds.), *Global health and global aging* (pp. 58–70). San Francisco: Jossey Bass.
- Government of Lesotho. (2001). *Lesotho vision 2020*. Maseru: GOL.
- Government of Lesotho. (2004). *Kingdom of Lesotho poverty reduction strategy 2004/5-2006/7*. Maseru: GOL.
- Government of Lesotho. (2005). *Kingdom of Lesotho education sector strategic plan 2005–2015*. Maseru: Ministry of Education and Training.
- Kaschula, R. H. (Ed.). (2001). *African oral literature: Functions in contemporary contexts*. Claremont: New Africa Books.
- Lephoto, H. M., Mohasi, M., & Batwa, Y. D. M. (1996). Towards coordination of adult education programmes in Lesotho. *Journal of AALAAE*, 10(1), 1–18.
- Lephoto, H. M., Braimoh, D., & Adeola, A. A. (2000). The state of adult and continuing education in Lesotho. In S. A. Indabawa, A. Oduaran, T. Afrik, & S. Walters (Eds.), *The state of adult and continuing education in Africa* (pp. 115–126). Windhoek: Department of Adult and Non-Formal Education University of Namibia.
- Lesotho Bureau of Statistics. (2012a). *Population ageing in Lesotho*. Maseru: Population Statistics Unit, Ministry of Development and Planning.
- Lesotho Bureau of Statistics. (2012b). *Key indicators*. <http://www.bos.gov.ls/>. Accessed 19 Aug 2013.
- Letsema. (2013). *Maseru women senior citizen association*. <http://www.letsema.org/organisation/maseru-women-senior-citizen-association/>. Accessed 22 Sept 2013.
- McWilliam, H. O. A., & Kwamena-Poh, M. A. (1975). *The development of education in Ghana*. London: Longman.
- Ministry of Social Development. (2010). *Public officers defined contribution pension fund*. <http://www.pensionfund.org.ls/member%20info/Member%20Booklet/member%20booklet.pdf>
- National University of Lesotho. (2012). *Annual report*. Roma: NUL.

- Preece, J. (Ed.). (2011). *Community service and community engagement in four African universities*. Gaborone: Lentswe La Lesedi.
- Preece, J., & Lekhetho, M. (2009). Combining literacy with vocational skills: Two case studies of non formal education for herd boys and farmers in Lesotho. In J. Preece (Ed.), *Nonformal education and poverty reduction: A comparative study* (pp. 45–58). Gaborone: Lentswe La Lesedi.
- Preece, J., Croome, D., Mpemi, R., & Ntene, M. (2011). Lesotho case study 2: Roma Valley pensioners project. In J. Preece (Ed.), *Community service and community engagement in four African universities* (pp. 95–106). Gaborone: Lentswe La Lesedi.
- Setoi, S. M., Mohasi, M. V., & Lepphoto, M. (2011). The Lesotho elderly pension scheme: Does it have implications for lifelong learning? *International Journal of Lifelong Education*, 30(1), 83–98.
- World Bank. (2012). *World Bank indicators: Lesotho*. <http://www.tradingeconomics.com/lesotho/age-dependency-ratio-old-percent-of-working-age-population-wb-data.html>. Accessed 16 July 2013.

Chapter 22

Malaysia

**Rahimah Binti Ibrahim, Tengku Aizan Hamid, Sen Tyng Chai,
and Siti Farra Zillah Abdullah**

Malaysia, a federal constitutional elective monarchy, is a developing country in Southeast Asia comprising of 13 states and three federal territories. The Federation of Malaya gained its Independence from British colonial rule in 1957 and formed Malaysia in 1963 together with Sabah and Sarawak.

Malaysia is a newly industrialized country with goals to be a high-income and developed nation by 2020. It has grown to become one of the largest economies in the region as the country diversified and modernized its economy from agriculture and mining to services and manufacturing. Through strong central planning and export-oriented industries, Malaysia's nominal GDP grew to USD 305.1 billion in 2012, with a GDP per capita of USD 10,432 for the same year (World Bank 2013). With a projected total population of 30 million in 2014, Malaysia is a multiracial and multicultural society where about 63 % is made up by the Malays and Bumiputera (indigenous and native peoples), followed by the Chinese (22 %), Indians (7 %) and other ethnic groups (0.9 %). Due to a steady decline in fertility rates over the past three decades, the country's population is ageing rapidly (see Table 22.1).

In comparison with many other countries, Malaysia is still a relatively young nation with a population median age of 26.3 years in 2010, but the figure will reach 29.9 years in 2020 and 36.0 years in 2040 (Department of Statistics 2012). The number of older Malaysians aged 60 years and over is expected to increase from its current 2.7 million in 2014 to 3.4 million in 2020. Following the definition

R.B. Ibrahim (✉) • T.A. Hamid

Institute of Gerontology, Universiti Putra Malaysia, Serdang, 43400 Selangor, Malaysia

Faculty of Human Ecology, Universiti Putra Malaysia, Serdang, 43400 Selangor, Malaysia

e-mail: imahibrahim@upm.edu.my; tengkuaizan@gmail.com

S.T. Chai • S.F.Z. Abdullah

Institute of Gerontology, Universiti Putra Malaysia, Serdang, 43400 Selangor, Malaysia

e-mail: chez1978@gmail.com; f4rra@yahoo.com

Table 22.1 Older Malaysians (60 years or over) by Ethnicity, 2000, 2010 & 2020

60+	2000		2010		2020	
	n ('000)	%	n ('000)	%	n ('000)	%
Malay & Bumiputera	804.2	5.6	1242.8	7.0	1889.3	9.1
Chinese	501.0	8.8	778.0	12.1	1153.8	16.9
Indians	93.9	5.6	150.4	7.8	254.7	12.1
Others	12.5	6.2	11.4	4.9	21.1	6.9
Total	1451.7	6.2	2248.6	7.9	3440.9	10.6

Source: Department of Statistics Malaysia (2001) and (2012)

by Chen and Jones (1989), Malaysia will become an aged nation in 2035 when the older population aged 60 years or over reach 15 %.

Older Malaysians are a highly heterogeneous group by their socioeconomic and geographic characteristics. While the rural areas are ageing more rapidly, a majority of older persons are located in urban towns and cities. Selangor, for example, is the most developed and populous state in Malaysia with a relatively young population but it also has the highest number of older persons, overtaking Perak in the 2010 census.

It is evident that the rapid increase in the number and proportion of older persons is a trend that is set to continue (Hamid 2012). Malaysians are not only living longer and healthier lives, but their old age experience is going to be different from the previous generations of the elderly. As a case in point, 73.2 % of older Malaysians aged 60 years or over have never been to school in 1980. By the time of the 2010 Census, this figure had dropped to 56.5 %. In the same period, the proportion of older Malaysians who received tertiary education increased from 0.4 to 3.7 %. It is expected that nearly 8 % of older persons in Malaysia would have had some form of tertiary education by 2020. Given the limited schooling opportunities during pre-Independence years in Malaya, a majority of the older persons today do not possess any post-secondary level qualifications. The question is, has sufficient attention been paid to issues of lifelong learning in later life in Malaysia? How are the developments in adult and continuing education benefitting senior citizens and older persons, as we look beyond the narrow focus on human capital and productivity gains?

22.1 Lifelong Learning and Older Persons in Malaysia: National Policies and Strategies

In the Preliminary Report of the Malaysia Education Blueprint (2013–2025), it was noted that federal government allocated RM37 billion or 16 % of its budget on education in 2012 (Ministry of Education 2012). Between the year 2000 and 2010, the federal government operating and development expenditure on education grew from RM20 billion (23.7 %) to almost RM50 billion (24.4 %) (Ministry of Finance 2003, 2011). The Ministry of Education (MOE), together with the Ministry of Health, makes up about 55 % of the 1.14 million strong civil service in 2013.

The Ministry of Education in Malaysia is responsible for pre-school, primary, secondary, post-secondary and tertiary education in Malaysia, mostly through the Education Act of 1996. It is important to note that the national education system has undergone significant changes, particularly in the 1970s when English-medium schools were converted into Malay-language national schools. Vernacular schools, using Mandarin and Tamil as the primary medium of instruction, continue to exist till this day in the form of national-type schools. With the liberalization and privatization of higher education in the 1990s (Yip 1997), the growth of tertiary education sector accelerated and in 2012, there are 20 public and 53 private institutions of higher learning, 26 private university colleges, seven branch campuses of foreign universities, 413 private colleges, 30 polytechnics and 80 community colleges (MOE 2013). Between 2004 and 2013, departments and agencies under the MOE were separated to form a Ministry of Higher Education (MoHE). Lifelong learning was specifically referred in the 8th Malaysia Plan (2001–2005) and the Third Outline Perspective Plan (OPP3, 2001–2010) which noted that lifelong learning is important in a knowledge-based economy (Economic Planning Unit 2001, p. 162).

Under the National Higher Education Action Plan (2007–2010) (MoHE 2007), the *enculturation of lifelong learning* was outlined as one of the seven strategic thrusts (p. 9) to transform higher education in Malaysia. The document envisaged the Government to play a key role in *setting the direction and creating the instruments to govern the development of lifelong learning* in the country. One major focus is to increase the number of adult learners with tertiary qualifications to meet Malaysia's human capital development needs. The main concept of lifelong learning as promoted by the Ministry is based on four objectives, which are (1) to fulfill individual needs, (2) to fulfill manpower needs, (3) to promote active citizenship, and (4) to promote evenness in social status. In 2009, the Department of Community College Education was established to strengthen its role as a champion of technical, vocational education and training (TVET) and to become a hub for lifelong learning (MoHE 2012). From the initial 12 community colleges set-up in 2001 under the Department of Polytechnic and Community College Education, there are now 80 community colleges established in almost every state except Kelantan in 2012. The lifelong learning blueprint (MoHE 2011) specifically stated that:

...community colleges will offer programmes which are relevant to the needs of the local community, assist the poorest segments of society, the underprivileged, the disabled and senior citizens to enhance their communication and computer skills. (p. 60)

Four key strategies were prescribed, namely:

- (i) to upgrade mechanisms and infrastructure for lifelong learning,
- (ii) to enhance public awareness and participation in lifelong learning,
- (iii) to ensure continuity and appreciation of lifelong learning, and
- (iv) to provide financial support for lifelong learning.

In a decade after its establishment, the community colleges began to occupy the space that was once dominated by the polytechnics as well as the National Youth Skills Institute (IKBN) under the Ministry of Youth and Sports. The community

colleges, with their diplomas and certificates, are still mostly about post-secondary education, workforce re-training and fulfilling manpower as well as human capital needs. Although older persons (and the disabled) were given fee waivers to take part in short courses, the number of elderly participants grew from a paltry 2753 persons in 2010 to 10,061 persons in 2013 (Ministry of Women, Family and Community Development 2014).

The challenges to lifelong learning in later life stem from a traditional, welfare-oriented approach to old age and ageing issues in Malaysia. Since the Ninth Malaysia Plan (2006–2010), the Government has stated an intention to adopt “a development approach to ensure active and productive ageing” among older Malaysians (p. 311). Programmes emphasizing community participation and lifelong learning were encouraged to enable older persons’ “continued contribution to family, society and country” (RMK-9, Government of Malaysia 2005). This echoes the objective in the National Policy for the Elderly (NPE) introduced in 1995 to “improve the potential of the elderly so that they continue to be active and productive in national development”. It was not until the new National Policy for Older Persons adopted in 2011 that lifelong learning was explicitly outlined as a key policy strategy to improve the well-being of older Malaysians. These developments were in line with Issue 4 of the first Priority Direction (Older Persons and Development) of the Madrid International Plan of Action on Ageing (MIPAA) on ensuring older people’s access to knowledge, education and training.

There is a strong synergistic potential between the community colleges, the designated hub for lifelong learning, and third age education for older Malaysians. Under the Plan of Action for the National Policy for Older Persons, the Ministry of Education heads the sub-committee on education, and in recent years the community colleges started new campaigns to attract senior citizens and older adults to participate in their short courses and programmes. A central question is “What kind of third age education or lifelong learning in later life do older Malaysians want?” and “Is the supply compatible with the demand, and to what end should these activities lead?”

22.2 Formal, Non-formal and Informal Learning Opportunities for Older Malaysians

Lifelong education covers “formal, non-formal and informal patterns of learning throughout the life cycle of an individual for the conscious and continuous enhancement of the quality of life, his own and that of society” (Dave and Cropley 1976, p. 11). The European Commission’s defined lifelong learning (LLL) as “all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective” (EC 2001, p. 9). The popularization of lifelong learning as a concept began with the convergence of the new knowledge-based economy and forces of globalization. As lifelong learning latches on to the imagination of policymakers, it has been touted as the solution to the onslaught of the new economy.

22.2.1 Formal Lifelong Learning

In Malaysia, lifelong learning has been consistently associated with productivity, employability or skill development, and less related to personal growth or active citizenship (Han 2001; Mohamed Rashid and Mohd Nasir 2003). As evident from national policy developments discussed earlier, lifelong learning in Malaysia is becoming highly institutionalized and formal lifelong learning, especially in public and private institutions of higher learning, is becoming increasingly common. Almost all major public and private universities run extension and continuing education centres or programmes, and distance education has been around since the 1970s (Madhu 2002; Muhamad 2001). In 1999, the Open University Malaysia (OUM) was founded “to coordinate the open and distance learning programmes” of all eleven public institutions of higher learning at that time (Raghaven and Kumar 2008). Together with technical and vocational education under the MOE and post-secondary training through the Ministry of Human Resources (MHR), Ministry of Youth and Sports, Ministry of Rural and Regional Development, as well as other public and private skills training institutions, few of the formal lifelong learning opportunities are really intended for retirees or senior citizens. The national discourse on lifelong learning is currently linked to technical, vocational education and training (TVET), and special attention is needed for vulnerable priority groups such as the poor, the marginalized and “the elderly”. In recent years, there have been attempts to make formal lifelong learning more accessible to the general public. One such effort is the My3L (Malaysia’s Life Long Learning) initiative where a national lifelong learning directory was published by the Ministry of Higher Education in 2012. The 256-page directory listed a massive number of programmes and courses on a diverse number of topics offered through 15 government ministries and other related agencies (including universities, polytechnics and college communities) nationwide (MoHE 2012).

In 2005, Universiti Sains Malaysia (USM) launched a special intake programme for Malaysians aged 50 years and over. With a minimum SPM qualification and 10 years of relevant experience, senior citizens can enrol as a full-time undergraduate student and enjoy 50 % discount off their tuition fees. From the pioneer batch, six graduated in 2008 (New Sunday Times, 13 April 2008). The special intake programme gives senior citizens an opportunity to gain tertiary education alongside their younger counterparts. Unfortunately, both public and private universities (and colleges) remain unlikely avenues for formal learning in later life by older Malaysians. It is difficult to determine how relevant such tertiary or college degree learning programmes are to the present generation of older persons. Moreover, financial support and incentives for formal lifelong learning programmes were rarely extended to senior citizens. Selection of personnel for in-service training in skill development and postgraduate programmes normally applies specific cut-off age to ensure return of investment in human resource. Thus, there are real barriers for formal skill development and upgrading of qualifications but some improvements are underway.

22.2.2 *Non-formal and Informal Lifelong Learning*

The post-war and pre-Independence generation has limited access to formal education, especially for girls and young women at that time. In the late 1950s, remedial measures such as adult classes or night schools were set-up for those deprived of formal education opportunities. Since the introduction of the New Economic Policy in 1971, adult learning programmes were aimed at improving the literacy skills of vulnerable population groups, such as poor agricultural communities in rural areas (Muhamad 2001). Older Malaysians are generally excluded in formal lifelong learning programmes. As such, the current generation of older persons is mostly engaged in non-formal learning activities, primarily for religious and leisure pursuits.

In keeping with the tradition of religious learning, older Malay adults were found to be more accustomed to non-formal, experiential learning of Islam within community settings (Merriam and Muhamad 2000). For the Malays, learning the religion is considered compulsory so that they would be able to fulfil the five primary obligations or pillars in Islam. Mosque-based religious learning is common, and historically *pondok* schools or madrasahs have been catering to the needs of adult and older Muslim learners. Modern Islamic NGOs and madrasahs established popular learning camps and wakaf-based (charitable endowment) residential learning programmes for older persons. The al-Jenderami Foundation, for example, founded an older persons' centre (*Kompleks Warga Emas*) for Islamic learning purposes where the female residents spend their days in prayer and Quranic studies. The other conventional non-formal learning activities for older Malaysians occur mostly through senior citizen clubs or other non-government organizations.

Learning for leisure has been the mainstay of most senior citizens' programmes and activities. The National Council of Senior Citizens Organizations Malaysia (NACSCOM), an umbrella body for almost 40 affiliated clubs, was established to advocate for the well-being of older persons, although most were located in urban areas. The Ministry of Health, under its National Health Care Policy for Older Persons, encouraged the set-up of over 200 public health clinic-based senior citizen clubs whose members participate in organized talks, seminars and other health and fitness activities. In line with the government's call and support for active and productive ageing, 18 Senior Citizen Day Care Centres (PJHWE) under the Central Welfare Council of Malaysia (MPKSM), were converted into Senior Citizen Activity Centres (PAWE) in 2012. Today, the Department of Social Welfare Malaysia lists 22 such centres throughout the country. The Department also funds other activities for older people through smart partnerships with NGOs.

It is important to bear in mind that lifelong learning is not something new to older persons in Malaysia as the concept of learning from cradle to the grave is well established in this Asian culture. The difference lies in the modern education system which formalized the process of learning, and as such, excluded adult and older learners until late modernity. It was only in the early and mid-2000s when social programmes for senior citizens in Malaysia began to incorporate educational ele-

ments by going beyond learning for leisure. Most of the learning in later life happens within the ambit of non-formal education system, characterized by limited public funding and resources as well as selective coverage areas. Major examples of such initiatives include the DAGS-funded projects (Demonstrator Application Grant Scheme) for NACSCOM, Eagle's Nest, Kajang and the Malaysian Government Retirees Association to bridge the digital divide for older Malaysians; the Young-at-Heart (later Young and Active) programmes by YMCA Kuala Lumpur and Yayasan Nanyang Press; as well as the Green Pine Elderly Services which promotes third age education. Many of the programmes and initiatives have been discontinued, including the Malaysian Chinese Association's (MCA) Lifelong Learning Campaign (LLC). Similarly, the Malaysian Grid for Learning (MyGfL), a national e-learning initiative undertaken by MIMOS Berhad in 1999, was also discontinued recently despite the portal being made available to the public since 2004 and recording 14,000 registered users (with more than 60,000 monthly hits) in 2006 (Arabee and Mansur 2006). In reality, extension and continuing education providers – be they from the public, private or civil society sectors – face significant sustainability challenges. It is difficult to target a market for older learners, simply because economies of scale are hard to achieve.

Lifelong learning as a right and necessity must be properly appreciated. In practice, the concept of lifelong learning by academicians, policy makers and older persons can differ significantly. While educators view lifelong learning as a necessity, governments mostly use it to advocate workforce retraining and skills upgrading. This is a common divergence in the conceptualization of lifelong learning and not a problem faced solely by older learners in Malaysia.

22.3 The University of the Third Age Malaysia Programme

In 2007, the Institute of Gerontology (IG), Universiti Putra Malaysia (UPM), piloted a Lifelong Learning Initiative for the Elderly (LLIFE) where important lessons were drawn to develop a University of the Third Age (U3A) programme in Malaysia (Ibrahim and Hamid 2012). With initial funding support from the Government of Malaysia and the United Nations Population Fund (UNFPA), Prof. Dr. Tengku Aizan Hamid decided to empower older persons through lifelong learning activities under a new country project. Specifically, the aim was to encourage active and productive ageing by realizing the potential, ability and experience of older Malaysians for greater socio-economic and cultural integration.

From past literature on third age education and U3A in the region, it was evident that there are significant differences in terms of the target audience's expectations and interests for lifelong learning in old age for a highly heterogeneous older population (Picton and Yuen 1998; Merriam and Muhamad 2000; Yenerall 2003; Huang 2005; Hori and Cusack 2006; Leung et al. 2006; Jun and Evans 2007). At the conclusion of the pilot LLIFE programme, it was decided that it would be too much to expect a full-fledged, self-help organization like the UK model to materialize at the

initial stages. On the other hand, despite the advantages of an academic French model, long-term sustainability and autonomy issues were raised. In addition, the researchers had to address several practical issues in terms of operational logistics, coordination and planning. With these issues in mind, the U3A Malaysia programme was developed through a hybrid of the French and British U3A models.

22.3.1 Programme Goals, Membership and Courses

The word “University” in U3A refers to its original meaning – a community of persons devoted to learning and all its associated activities. It does not confer any academic degrees but is simply a co-operative of persons who want to learn and help others learn (Laslett 1989). As such, there are no academic pre-requisites and anyone can join. Participants not only broaden their knowledge, skills and experience through the U3A programme, but also contribute and actively participate in their own learning and well-being. U3A Malaysia was envisioned right from the outset as a programme for senior citizens by senior citizens, and a membership structure was adopted so that a pro-tem committee could be established as early as possible.

The lifelong learning programme aims to:

- (a) Optimize the potential, ability and experience of older Malaysians through life-long learning;
- (b) Improve social, economic and cultural participation of older Malaysians towards an active and productive old age, and;
- (c) Increase the opportunities for older Malaysians to contribute towards national development.

The U3A Malaysia programme was structured to reflect a tripartite collaboration between senior citizens (U3A members), a coordinating body (U3A KL & Selangor) and content/knowledge providers (instructors and venue partners). Courses were designed to encourage the acquisition of new knowledge, skills and experience by older persons for a variety of purposes, such as income generation or self-improvement. Every year, members can choose to sign up for any of the courses offered in a given semester (held twice a year) for a nominal sum of about USD10 (RM30) per course, which lasts between 4 and 8 weekly classes of 1.5–3-h sessions. Courses can be organized with any instructor or facilitator and at different locations. Most of the courses are held in collaboration with other faculties and centres in UPM. Some classes and courses were held outside campus grounds and in partnership with other institutions such as the National Arts, Culture and Heritage Academy (ASWARA), and the Hulu Langat Community College (KKHL). At the end of every programme year, participants were invited for feedback and focus group evaluation sessions, and a certificate presentation ceremony and open day exhibitions showcasing some of the course outputs were held. There are no exams and tests, but courses are evaluated and tracked for appraisal purposes.

Since the programme's inception in 2008 with 84 senior citizens from the neighboring vicinity of Kajang and Hulu Langat, Selangor, the University of the Third Age Malaysia has grown to over 630 registered members who participate in more than 50 different courses. Most of the U3A members are women (64.7 %), Malay (55.7 %) and almost all have at least some secondary level education (94.6 %). In the past 6 years, senior citizens between the ages of 50–84 year old (Mean = 63.2, SD = 6.244) chalked up about 90–120 learning hours per year per person under the programme (an average of 3–4 courses per semester). A majority of the U3A members come from the state of Selangor, followed by Kuala Lumpur, with a small number from Putrajaya and other nearby states like Negeri Sembilan. For further information, interested parties can access more U3A Malaysia programme details at <http://u3amalaysia.wordpress.com> or <https://www.facebook.com/U3AMalaysia>.

22.3.2 Programme Impact, Sustainability and Up-Scaling Initiatives

U3A Malaysia has not only broadened the knowledge, skills and life experiences of its members but also encouraged older persons to participate actively in their own learning. These senior citizens regularly provide input, feedback and assessment of the courses and some became course instructors themselves. In line with its broader mission to assist in the formation of new U3As which are autonomous and self-sustaining with the participation of older persons themselves, a pro-tem committee registered the Association of Lifelong Learning for Older Persons (U3A) Kuala Lumpur and Selangor (No. 2522-10-SEL) with the Registrar of Societies, Selangor in 2010. Today, the programme under U3A KL & Selangor is funded directly through the Department of Social Welfare, Malaysia, and the senior citizens themselves manage the programme with administrative support from IG.

The lifelong learning programme is being expanded and piloted for nationwide replication and up-scaling, in partnerships with other government agencies as well as non-government organizations. The project has led to new initiatives such as the lifelong learning pilot programme for the federal-funded institutionalized elderly and the e-MAS knowledge transfer programme where senior citizens are trained to be ICT instructors and facilitators with NACSCOM. U3A members also regularly participate in IG research activities and other pilot initiatives, such as the Intergenerational Learning Programme supported by UNESCO and the Mature Women Financial Empowerment Programme supported by the Citibank Foundation.

The University of the Third Age Malaysia programme has proven that there is a strong demand for affordable lifelong learning activities in later life. The programme is a platform for more than just learning for leisure but a potential force

for the mobilization of older persons. The benefits of the U3A Malaysia programme, be they in the form of broadened social networks or fellowship, greater knowledge and skills, more opportunities for community integration or self-discovery, is all about empowering older persons to make a difference for themselves and their peers. Compared to the explosive rate of growth in the UK or Australia during their early years, U3As are still uncommon in Malaysia as the movement has yet to gain traction among key stakeholders who also lack the resources to replicate the lifelong learning programme. If lifelong learning for older Malaysians via the U3A model is to take root in this country, there have to be more co-operative partnerships between public, private and civil society groups. In the following final section, the main issues and way forward are discussed.

22.4 Issues, Challenges and the Way Forward for Lifelong Learning in Later Life in Malaysia

The issues and challenges of lifelong learning for older Malaysians can be divided into several broad categories, that is, policy framework and funding of lifelong learning programmes for elders, mobilization for own learning, learning environment and elder empowerment.

22.4.1 The Policy Framework

Recent development in education and ageing in the Malaysian context can be attributed to three major policies. These are the National Higher Education Strategic Plan (2007–2020), The Enculturation of Lifelong Learning (2011–2020) and the National Policy for Older Persons (2011–2020). The two earlier policies, under the purview of the Ministry of Education, are designed to develop human capital to cater for the need of human resource for nation building. Specifically, the lifelong learning strategies outlined in the enculturation of lifelong learning blueprint are not meant for older persons. The streamlining of various lifelong learning programmes under the Ministry of Education has the potential to diminish other forms of learning that are not tied to human capital development. The National Policy for Older Persons envisions that lifelong learning will equip and increase the knowledge, skills and experience of older adults to lead active and productive lives in their community. It is not just about “active ageing” but also drawing a connection between doing and learning, thus broadening possibilities and opportunities through third age education and learning in later life. This strategy also stresses human capital development to prepare for our old age given that prevention measures and coping with change tend to work better than welfare-based solutions.

22.4.2 Funding of Lifelong Learning Programmes for Older Persons

It is difficult to convince policymakers on the soundness of funding lifelong learning programmes for older people, especially when potential labour benefits (working years) are calculated. This myopic view, however, ignores the potential health benefits and employment opportunities that can be improved via learning for an active and productive old age. Programmes related to education, training and lifelong learning should reinforce positive values, as well as strengthen economic, health, and psychosocial outcomes for seniors. Furthermore, the private sector could also contribute to the development and continuity of third age education among older persons. Corporate social responsibility programmes should diversify to include senior citizen empowerment programmes where their contributions can come in many different forms.

22.4.3 Mobilizing Older People for Their Own Learning

In truth, older persons themselves must awaken to the need to continue learning and remain active and productive in later life. To be open to something new in life and to keep on learning is not an easy feat for anyone at any age. The learning process can pose further challenges to people in their third age, as there are many more barriers than opportunities. As such, it is crucial to create opportunities and mobilize resources to help older persons overcome these barriers. Initially, getting past the negative attitude towards learning in later life is crucial. Efforts to create awareness and change people's mindset have to be targeted at two groups, the older persons and their family members. Better opportunities for learning can be created through a change in mindset, where older persons are accepted as partners in learning, with support from the family to create a sustainable learning experience.

22.4.4 The Right Environment for Learning

The U3A programme in Malaysia is conducted using university facilities and infrastructure of participating learning institutions. The environment provided has to be conducive for learning with additional attention to accessibility, security and safety regulations for older learners. Few elders have had the opportunity to experience learning in a tertiary education setting and many are proud to be associated with university activities and programmes, which vastly improves their motivation and enthusiasm. Where possible, public institutions of higher learning should make space for third age education and encourage a satellite of learning activities to be coordinated for older Malaysians.

22.5 The Way Forward?

We envision that lifelong learning among older Malaysians will become a significant movement in the near future. The favourable conditions for expansion and the policy to support these activities are already in place. Both the education and the national policy of older persons stresses the need for capacity building, entrepreneurial skills and increasing well-being of the population through learning activities. Moreover, the inclusive approach adopted by the Government of Malaysia in planning for economic development will help to ensure the needs of different segments of the population will be addressed.

Malaysia as signatory to the MIPAA has to concur with the need to implement its Plan of Action. One major direction is lifelong education to improve the well-being of older persons. Learning and education is a powerful tool to empower older Malaysians. The practice of involving older participants in planning and designing programmes will help to ensure a match between the need and provided content to remain as relevant and appropriate. A broad spectrum of information is needed by older persons as they go through the third and the fourth ages of life and the delivery can be carried out in various forms using a mixed methodology of non-formal, informal and self-directed learning. As it is, there are now 'super' senior citizen centres such as the three-storey, purpose built SECITA (Senior Citizens Association of Selangor and Federal Territory) building in Kelana Jaya and the four-acre multi-facility AUTORR (Aged Unite to Organize Rest and Recreation) centre in Ampang. The future of third age education lies with a rising cohort of affluent and educated older Malaysians. Even elder tours and study visits by older learners have proven to be a highly profitable venture overseas and there is no reason why the education-based silver industry will not emerge to meet growing demands.

22.6 Conclusion

As more Malaysians live longer, maintain relatively good health and possess sufficient means, there is a growing demand for learning in later life. In an increasingly knowledge-based economy and knowledge driven society, lifelong learning plays a major role in improving the lives of older persons. Lost opportunities of learning through the formal education system have resulted in the need for non-formal learning services. Retirees, pensioners, the elderly or older persons – those in the third age of life – have a lifetime of experience to share and the resources to engage in a variety of economic, social and cultural activities. Given the right incentives, there are many tangible and intangible benefits of a third age education for senior citizens in Malaysia. Whether it is to bridge gaps in the digital divide, cultivate a creative hobby or improve health and fitness, learning in later life has become a byword for self-improvement and self-care.

Although third age education in Malaysia is still at a nascent stage, there is a growing awareness among the general population, both young and old, of the importance of gerontology, geriatrics and adult development. The U3A programme has been well received by participating senior citizens and the continued support for the programme by all stakeholders has been critical in its success. Press coverage for the lifelong learning activities has been extensive and positive, which generated a lot of interest and positive impact for the programme. It has been established that many older Malaysians are interested in a broad range of learning activities that can greatly enrich their sunset years. U3A members are acquiring new knowledge, skills and experiences which they apply in their everyday activities. One major challenge ahead is to identify multi-sectoral partners to support the programme activities for nationwide replication and up-scaling so that it can be expanded to other areas. Ultimately, all the lifelong learning programmes must be sustainable in the long run, and older persons themselves must be engaged and mobilized in the planning and delivery of the activities. By enhancing the opportunity for lifelong learning, education and training through University of the Third Age, it is hoped that older Malaysians will be able to lead a more fulfilling, active and meaningful old age.

References

- Arabee, Z., & Mansur, A. (2006). MyGfL: A lifelong learning platform for Malaysian society. *The Electronic Journal of e-Learning*, 4(1), 7–14. Retrieved from www.ejel.org.
- Chen, J. A., & Jones, G. W. (1989). *Ageing in ASEAN: Its socio-economic consequences*. Singapore: Institute of Southeast Asian Studies.
- Dave, R. H., & Cropley, A. J. (1976). *Foundations of lifelong education*. New York: UNESCO Institute for Education, Pergamon Press.
- Department of Social Welfare, Malaysia. (1995). *National policy for the elderly*. Kuala Lumpur: JKMM.
- Department of Social Welfare, Malaysia. (2011). *National policy for the elderly*. Kuala Lumpur: JKMM.
- Department of Statistics, Malaysia. (2001). *Population and housing census of Malaysia, 2000: Population distribution and basic demographic characteristics*. Putrajaya: DOSM.
- Department of Statistics, Malaysia. (2012). *Population projections, Malaysia, 2010–2040*. Putrajaya: DOSM.
- Economic Planning Unit. (2001). *Third outline perspective plan (OPP3), 2001–2010*. Putrajaya: EPU.
- European Commission. (2001). *Making a European area of lifelong learning a reality (COM/2001/678)*. Brussels: EU.
- Government of Malaysia. (2005). *Ninth Malaysia plan, 2006–2010*. Putrajaya: Government Press.
- Hamid, T. A. (2012). Population ageing: Past, present and future trends. In T. A. Hamid, H. Sulaiman, & Z. A. Siti Farra (Eds.), *Profile of older Malaysians: Current and future challenges* (pp. 3–32). Serdang: Universiti Putra Malaysia (UPM).
- Han, S. (2001). Creating systems for lifelong learning in Asia. *Asia Pacific Education Review*, 2, 85–95.
- Hori, S., & Cusack, S. (2006). Third-age education in Canada and Japan: Attitudes towards aging and participation in learning. *Educational Gerontology*, 32(6), 463–481.

- Huang, C. S. (2005). The development of a university for older adults in Taiwan: An interpretive perspective. *Educational Gerontology, 31*(7), 503–519.
- Ibrahim, R., & Hamid, T. A. (2012). Experience of lifelong learning among participants of LLIFE programme. In T. A. Hamid, H. Sulaiman, & Z. A. Siti Farra (Eds.), *Profile of older Malaysians: Current and future challenges* (pp. 280–303). Serdang: Universiti Putra Malaysia (UPM).
- Jun, S. K., & Evans, K. (2007). The learning cultures of third age participants: Institutional management and participants' experience in U3A in the UK and SU in Korea. *KEDI Journal of Educational Policy, 4*(2), 53–72.
- Laslett, P. (1989). *A fresh map of life: The emergence of the third age*. London: Macmillan Press.
- Leung, A., Lui, Y. H., & Chi, I. (2006). Later life learning experience among Chinese elderly in Hong Kong. *Gerontology and Geriatrics Education, 26*(2), 1–15.
- Madhu, S. (Ed.). (2002). *Adult education in selected countries in the Asian region: A reference for policies, programmes and delivery modes*. Hamburg: UNESCO Institute for Education.
- Merriam, S. B., & Muhamad, M. (2000). How cultural values shape learning in older adulthood: The case of Malaysia. *Adult Education Quarterly, 51*(1), 45–63.
- Ministry of Education. (2012). *Preliminary report. Malaysia education blueprint 2013–2025*. Putrajaya: MOE.
- Ministry of Education. (2013). *Malaysia educational statistics 2013*. Putrajaya: MOE.
- Ministry of Finance. (2003). *Economic report 2003/2004*. Putrajaya: MOF.
- Ministry of Finance. (2011). *Economic report 2011/2012*. Putrajaya: MOF.
- Ministry of Higher Education. (2007). *National higher education action plan 2007–2010*. Putrajaya: MoHE.
- Ministry of Higher Education. (2011). *Blueprint on enculturation of lifelong learning for Malaysia 2011–2020*. Putrajaya: MoHE.
- Ministry of Higher Education. (2012). *Pemerkasaan Kolej Komuniti 2013–2015*. Putrajaya: MoHE.
- Ministry of Women, Family and Community Development. (2014). *Minutes of the national policy for older persons technical committee meeting (No. 1/2014)*. Putrajaya: MWFCDD.
- Mohamed Rashid, N. B., & Mohd Nasir, A. H. (2003). *Lifelong learning in Malaysia*. Paper presented at the international policy seminar on making lifelong learning a reality, June 24–26, 2003, IIEP/UNESCO & KRIVET, Seoul.
- Muhamad, M. (2001). *Adult and continuing education in Malaysia*. Serdang: Universiti Putra Malaysia Press.
- Picton, C., & Yuen, C. (1998). Educational interests and motivations of older adult learners: A comparative study between Australia and China. *Ageing International, 24*(2–3), 24–45.
- Raghaven, S., & Kumar, R. (2008). The need for participation in open and distance education: The Open University Malaysia experience. *Turkish Online Journal of Distance Education, 8*(4), 102–113.
- World Bank. (2013). *World Bank East Asia and Pacific economic update, October 2013: Rebuilding policy buffers, reinvigorating growth*. Washington, D.C.: World Bank Publications.
- Yenerall, J. D. (2003). Educating an aging society: The university of the third age in Finland. *Educational Gerontology, 29*(8), 703–716.
- Yip, K. L. (1997). Lifelong learning and vision 2020 in Malaysia. In M. J. Hatton (Ed.), *Lifelong learning: Policies, practices and programs* (APEC-HURDIT research project, 97, pp. 128–139). Toronto: Humber College School of Media Studies.

Chapter 23

Malta

Marvin Formosa

23.1 Introduction

The Maltese archipelago is made up of three islands: Malta, Gozo and Comino. It is located in the Mediterranean Sea with Sicily 93 km to the north, Africa 288 km to the south, Gibraltar 1826 km to the west and Alexandria 1510 km to the east.

Malta's population has evolved out of a traditional pyramidal shape to an even-shaped block distribution of equal numbers at each age cohort except at the top. Figures based on the 2011 Census indicate that, at end of 2013, 24.6 % of the total population, or 105,068 persons, were aged 60-plus (National Statistics Office 2014a). Table 23.1 provides a breakdown of the current total population aged 60 years and over for the year 2013. It highlights how the total number of persons aged 65 and over totalled 76,024 or almost 18 % of the total population. The largest share of the older population is made up of women, with 55 % of the total. In fact, the sex ratios for cohorts aged 65-plus and 80-plus in 2013 numbered 79 and 55 respectively. Amongst older cohorts, there is twice the number of women than men.

The advantage of women over men in life expectancy tables also means that, similar to international statistics, married men and widowed women are over-represented in later life. This has clear implications for social/health care policy, noting how by age 70 whilst the majority of women are widows, most men are still in married relationships. Such demographic statistics also highlight that older women tend to be in possession of lower levels of social and financial capital when compared to male peers. Indeed, despite the fact that women live longer, older

M. Formosa (✉)
Department of Gerontology, Faculty for Social Wellbeing, University of Malta,
Msida, MSD 2080, Malta
e-mail: marvin.formosa@um.edu.mt

Table 23.1 Total population by age (31 December 2013)

Age	Males	Females	Total	Percent of total pop.	Masculinity ratio ^a
All ages	212,424	212,960	425,384	100	99.7
60+	48,037	57,031	105,068	24.7	84.2
65+	33,632	42,392	76,024	17.9	79.3
80+	5851	10,591	16,442	3.9	55.2
60–64	14,405	14,639	29,044	6.8	98.4
65–69	14,289	15,206	29,495	6.9	94.0
70–74	7301	8580	15,881	3.7	85.1
75–79	6171	8015	14,186	3.3	77.0
80–84	3498	5874	9372	2.2	59.6
85–89	1759	3217	4976	1.2	54.7
90+	614	1500	2114	0.5	41.0

^aNumber of males per hundred females. *Source*: NSO (2014a)

women experience greater degrees of vulnerability. Many also find themselves constrained in a ‘caring’ straightjacket, as they tend to marry men older than themselves, who would need various levels of social and health support, whilst also caring for siblings and, at times, even grandchildren.

23.2 Provision and Participation

The 2011 Census reported a negative correlation between age on one hand and illiteracy and educational qualification/attainment on the other (Table 23.2) (National Statistics Office 2014a).

In 2011, the literacy rate stood at 93.6 % for persons aged 10-plus – 24,074 illiterate persons (6.4 %) (Fig. 23.1). The literacy rate was highly influenced by age, and hence, localities with high percentages of persons aged 65-plus exhibited higher illiteracy rates.

The illiteracy rate varied between 23.3 % for persons aged 90-plus to 10.3 % for those aged 60–69, continuing to decrease gradually to a minimum of 1 % for persons aged 10–19. It is noteworthy that whilst in younger cohorts more males than females are illiterate, the opposite is true in older cohorts.

Participation in older adult learning is located in a variety of avenues, ranging from formal to non-formal to informal learning possibilities. Formal learning avenues are highly structured and hierarchical. Courses are designed by expert-teachers to meet explicit requirements of accrediting bodies. Whilst higher education is responsible for the issuing of undergraduate and postgraduate degrees, the further education sector provides curricula that generally lead to vocational skills and diplomas. In Malta, key formal learning avenues open to adults include the Institute of Tourism Studies (ITS), the Directorate for Lifelong Learning within the Ministry for Education and Employment (DLL), the Malta College of Arts, Science and

Table 23.2 Total Maltese population by age and educational status (2011)

	60–69	70–79	80–89	90+	% of 60-plus
Educational attainment					
No schooling	647	2504	2424	363	5.8
Primary	29,912	16,678	7030	974	53.5
Lower secondary	14,909	6391	2196	378	23.4
Upper secondary	3377	1309	445	85	5.1
Post-secondary non-tertiary	1762	756	250	31	2.7
Tertiary	4416	1864	716	79	6.9
Educational qualification					
No qualifications	37,697	22,779	10,918	1592	71.5
Secondary school leaving certificate	2422	1238	409	67	4.1
Ordinary levels	5510	2018	501	91	8.0
Advanced levels	1431	457	163	31	2.0
City and Guilds	2807	1142	354	50	4.3
First Diploma	26	–	–	–	0.03
National Diploma	15	4	–	–	0.02
National Higher Diploma	27	1	–	–	0.03
University level diploma or certificate	1268	500	151	13	1.9
First (Bachelor's) degree or equivalent	1854	925	398	46	3.2
Postgraduate diploma or certificate	468	167	62	8	0.7
Master's Degree	607	179	63	8	0.8
Doctorate	192	82	42	4	0.3

Source: NSO (2014a)

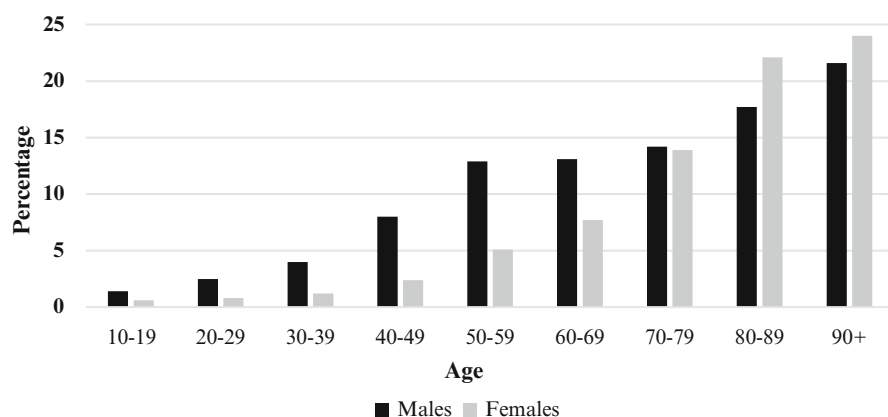


Fig. 23.1 Illiteracy by age and gender (Malta, November 2011) (Source: National Statistics Office (2014b))

Technology (MCAST), and University of Malta (UOM). In many ways, the situation is highly inadequate. Only 2 % of Maltese older adults aged 60-plus participate in formal learning avenues. It is also disquieting that older learners in these institutions constitute very low percentages of the total student population, such as 0.5 % in the case of the University of Malta (2014, personal communication). One relative exception is the Directorate for Lifelong Learning where students aged 60-plus constitute 13 % of the total student body. The Directorate for Lifelong Learning has been organising day and evening courses for learners from the age of 16 upward for a considerable number of years. It offers several different courses, mostly in the evening, covering academic, craft, leisure, information technology, and aesthetic subjects.

The reasons for the low participation of older adults in formal education are various. Many retirees left school at a relatively early age largely due to socio-economic imperatives, lack of opportunity to pursue education beyond the basic levels, and especially in the case of women, cultural mores that envisioned the role of women as one of domesticity. Such experience is unlikely to engender an avid desire to pursue further formal study later in life, and many even developed a phobia toward learning:

I applied with immense trepidation. My parents thought that school was a waste of time for girls, and when my parents were reluctant to buy me some books I needed, my teacher advised them to keep me at home. I was ten years old ... I am very apprehensive of the whole learning experience. I needed, and still need, a lot of encouragement to attend classes...but remembering that I will be assessed gives me jitters. (undergraduate theology student, 67 years old, cited in Formosa 2010a: 69).

Another barrier is that higher and further education institutions are not passionate about late-life learning and opening their doors to older learners. Older adult learning does not bring in grants or offer much career training paths in vocational centres. It tends to be ignored and not be given any priority in marketing exercises. Educational and gerontological institutions alike are quick to accept uncritically the ‘failure’ and ‘medicalized’ models of lifelong development where older adults are casted as passive ‘clients’ and ‘patients’ rather than learners. The result is a lack of serious interest in older adult learning in favour of research enterprises that seek to legitimise higher education norms as solely as a career-training enterprise linked to social and health welfare reforms. However, one success story is found within the course ‘Teaching older adults’ as part of the course leading to a Masters in Adult Education (University of Malta) which, in 2010, was opened to the public (Formosa 2010b, 2012b). Four older adults read the course with other students, and contributed actively to each lecture session. It is hoped that more opportunities are provided to older adults to participate in higher and further education.

Non-formal learning consists of structured events organised by local authorities and the voluntary sector that offer learning programmes ranging from creative to educational to informational. Programmes organised by local authorities are popular with older adults who do not want the pressure of credit courses but who still value the expert-teacher as a source of knowledge. The voluntary sector is the essence of learning by doing, as well as seeking and providing educational opportunities

through their particular ethos. It is within the voluntary sector where the largest majority of older learners are situated and which holds most benefits for participants. Many older adults provided vivid testimonies of the benefits that learning brings as they emphasised their appreciation of learning for its own sake:

I discovered abilities that I never knew I had. I now feel fulfilled. When learning I feel alive ... I suffer from arthritis and bad back pain. Attending the University of the Third Age helps me to overcome my pain, mentally at least. The joys of learning help me to forget my physical ailments ... When my husband died I needed a new lease of life. Learning how to sew and knit gave me what I needed ... Learning gave me confidence and more self-esteem. (various interviewees, cited in Formosa 2010a: 73)

Voluntary bodies have limited income and depend on volunteers for survival, so that those contacted claimed that it was not possible for them to keep up a database of. One exception is, however, the University of the Third Age (U3A). U3As can be loosely defined as socio-cultural centres where older persons acquire new knowledge on a range of significant issues. The University of the Third Age in Malta – or as it is called in Maltese *Universita' tat-Tielet Eta'* [U3E] – is the only local voluntary institution that caters solely to the learning interests of older adults. This is possible because the University of Malta subsidises the rent of its premises, as well as for the fees of lectures and a full-time coordinator. Membership can be easily acquired by those who have passed their 60th birthday and are willing to pay a nominal fee of €12. The U3E operates from four centres – namely, Floriana, Sliema, Kottonera, and Ghajnsielem in Gozo. The Gozitan centre was established in 1999 as a result of collaboration between the Ministry for Gozo and the University of Malta, whereby transport for learners to reach the lecturing centre is provided by the former. The U3E centre in Kottonera was the result of another collaborating venture, this time with the Parliamentary Secretariat for Active Ageing. U3A members tend to be in the 60–74 age band, with both membership and participation falling steadily with increasing age. Female members outnumber males (3:1), with the ratio increasing when one focuses solely on course attendance (5:1). Members also tend to reside in Southern and Harbour Regions (Table 23.3).

One recent learning initiative with older persons that sought to engage learning as a catalyst for improved levels of active citizenship amongst older adults in the community is described by Borg and Formosa (2013, 2016). The goal of the learning programme was to put forward a number of complex generative themes – namely, capitalism, poverty, globalisation, social exclusion, income security, and disability-

Table 23.3 U3E members by centre and gender (academic year 2013/2014)

U3A centre	60–69	70–79	80–89	90-plus	Total	Total	
						Males	Females
Floriana	265	179	73	10	527	153	374
Sliema	55	23	17	1	96	42	54
Kottonera	22	4	4	1	31	11	20
Ghajnsielem	24	32	7	2	65	6	51

Source: Formosa (2015)

so that “learners and teachers engage together in new possibilities and de/re/constructions of knowledge” (Burke and Jackson 2007: 176). The ensuing sessions were immensely productive and vibrant, succeeding in bridging ‘reflection’ with ‘action’ through the formulation of manifesto for intergenerational solidarity for the community in which the programme took place. The learning programme resulted in three key contributions. First, learners discussed how living in a world where nations are no longer in total control of their destiny, as international governmental organisations, ranging from the World Bank to the World Trade Organisation, have assumed the role of influential policy and economic drivers. Secondly, participants became aware that modern societies are witnessing the emergence of a more aggressive form of capitalism, one that contrasts with the more controlled and regulated capitalism of the 1950s and 1960s. And finally, participants shared their experiences that demonstrated how social and health care services are increasingly driven by a market-based approach that is leading to the erosion of the welfare state on which many people depend and, as a result, the exacerbation of social exclusion.

Informal learning refers to day-to-day incidental learning where people are not necessarily aware of the ongoing learning processes. Informal learning occurs in a wide range of locations ranging from libraries to dance clubs, generally through self-directed strategies where learning typically begins with a question, a problem, a need to know, or a curiosity. The sparse literature on older adult learning in Malta places emphasis on non-formal learning experiences, and to date, there has been no discussion of the informal practices (Formosa 2010a, 2012b). The fact that national statistics on cultural activities (ranging from dance classes, membership in band clubs, participation in local council activities) put adults aged 25 and above in one age bracket – and that no data is available on the frequency of older persons visiting museums, theatres, cinemas, exhibitions, and art galleries, or who follow television and radio programmes for learning purposes – precludes an age-relevant insight on informal learning. Learning within the family, church and workplace, as well as intergenerational learning, constitute other lacunae in local research. Yet, a number of secondary sources do throw light on some aspects of informal learning in later life. One key avenue is travel, a practice that has become more popular with older persons in recent years. The connections between travel and learning are widely recognised by older learners:

Our hobby is travelling. But ‘hobby’ is not the best word to describe it because we do not travel for sun and sea escapes. We indulge in ‘travel’ because it opens one’s mind, you learn so many things. The same can be said of the Louvre. I visited it two times and wish to visit again ... Every country can stimulate your mental faculties, not just Italy and England, but even countries such as Slovakia, Tunisia, and Cyprus. (older adult, 80 years old, cited in Formosa 2010a: 74)

One final concern related to the provision and participation of older adults in learning concerns pre-retirement learning. It is unfortunate to note that pre-retirement learning is more the exception than the rule, and where it occurs, participants also complain of the didactic and authoritarian style of most presentations which imbues them with some level of concern and anxiety, rather than a positive view of

retirement as a catalyst for successful ageing. Hence, it is positive to note that the Parliamentary Secretariat for Rights of Persons with Disability and Active Ageing is in the process of organising nation-wide pre-retirement learning programmes, a much needed resource to age successfully.

23.3 The Politics of Older Adult Learning

In Malta late-life learning arises as the responsibility of various state ministries which is anything but well-coordinated. The result is that the range of available opportunities for later life learning are neither easily accessible nor clearly formulated. The manner in which older adult learning is planned and implemented fails in providing attention to learning as a means to strengthen communities and aid citizens maintain a sense of purpose. Indeed, while it is positive to note the emphasis on the need to provide learning opportunities for older cohorts, it is unfortunate that international policy documents are more driven to espousing the ‘human capital’ and ‘vocational’ values of late-life learning rather than its ‘humanist’ potential (Formosa 2013). The UN and EU visions for older adult learning are neo-liberal and economic in their foundation, where the solution to the problem of ageing becomes finding a way for older people to be economically useful. It is assumed that older adults find social value only by becoming part of the pool of surplus labour when, in actual fact, there is little evidence to support the usefulness of a strong human capital theory for older persons. An ‘economistic’ rationale dominates, so that late-life learning is not promoted for its possible ‘empowering’ and ‘transcendental’ potential, but only as a means to render the post-industrial societies ‘competitive in the face of the transitional and multinational corporations’ ability to reap the advantages of economies of scale through the expansion of international capital mobility’ (Borg and Mayo 2005: 18). Taking in consideration that productive policies are biased in favour of persons with dominant types and extensive volumes of cultural capital, one concludes that what the UN and EU offer to late-life learning is a ‘model of knowledge economy for some’ as opposed to ‘a model of a knowledge society for all’ (Borg and Formosa 2013).

In many ways, the local provision of learning opportunities for older adults fails in meeting the key priorities of social levelling, social cohesion and social justice. Rather than simply enabling people to adapt to and reintegrate within the existing system, one hopes that future initiatives in late-life learning embrace a transformative edge that empowers groups to confront the inequitable system with a view to change it. This is because, as Freire underlined more than four decades ago,

There is no such thing as a *neutral* educational process. Education either functions as an instrument that is used to facilitate the integration of the younger generation into the logic of the present system and bring about conformity to it, or it becomes the ‘practice of freedom’, the means by which men and women deal critically and creatively with reality and discover how to participate in the transformation of their world. (Freire 1970: 34 – italics in original)

The following issues discuss the ways in which older adult learning in Malta continues to marginalise the most vulnerable and socially excluded sector of the older population.

Elitism Confirming international research, there lies a positive correlation between middle-class background and participation. It is true that most learning opportunities are either free or demand only a nominal fee, and require no academic qualifications. Yet, the way most provision for late-life learning is organised – especially with respect to subject content and teaching styles – typifies a strong middle-class bias. The emphasis on liberal arts subjects, delivered by experts, means that (well-educated) middle-class elders perceive late-life learning as an opportunity to go back to an arena in which they feel confident and self-assured of its outcome and development. The working-class community, on the other hand, generally has limited schooling experience and a life history characterised by poverty and social exclusion, so that it enters later life permeated with a habitus of ‘necessity’ (Bourdieu 1984). The U3E is a clear case in point (Formosa 2000, 2007, 2009, 2012a, 2013, 2014). Despite its positive functions, the Maltese U3E is far from an example of democratic learning as its practice is highly biased in favour of the needs of middle-class urban older persons. Only one member among the 2005/2006 student body listed her past work as an elementary occupation, with a significant number of members – 209 or 29 % – having held professional roles (NSO 2006). Indeed, the U3E holds a useful function for middle-class retirees in their effort to maintain and improve their position in the class structure (Formosa 2000, 2009, 2010b, c, 2012c). As previous identities and statuses associated with one’s occupational position are erased and become meaningless, retirement acts as a ‘status leveller’ by putting persons from different class backgrounds closer together in the hierarchical social space. Retirement forces middle-class persons into an arena of role ambiguity, enforcing a dependence on the state welfare system, and decreasing their ‘social worth’ to the extent that their position in the ‘social space’ changes from that of ‘achievement’ to one of ‘ascription’. To offset such a levelling experience, middle-class older persons enrol in new arenas for moral and practical support, as well as to reassert their previous class position. Membership in the U3E provides members the possibility of acquiring the label of ‘cultured’ with respect to the rest of the older population. In the way that books and paintings are used to impress viewers, U3E membership becomes employed as a strategy of ‘distinction’ to obtain and compete for social honour – thus, serving as a reproductive and domesticating educational agent, and functioning as a perpetuator of ‘symbolic violence’ by imposing ‘middle-class’ meanings as legitimate.

Gender The application of a ‘gender’ lens finds elder-learning in Malta discriminating against both women and men (Formosa 2005, 2010b). On one hand, older women in Malta are less likely to have received workplace learning, received an apprenticeship, hold educational qualifications, and be in receipt of an occupational pension. Cultural constructs put a large proportion of older women in the army of informal carers who either support sick and disabled relatives, especially husbands and aunts, or as carers of their grandchildren whilst their children and sons/

daughters-in-law work full time. One can never overemphasise the ‘double standard of ageing’ – that is, the severe difficulties that older women face as the result of the combination of ageist and sexist prejudices. Again, there is extensive research on the local U3E underlining such a point (Formosa 2005, 2012c). The U3E overlooks the unique barriers faced by older women such as their low expectations that they can participate successfully in educational pursuits, difficulties reaching learning centres due to inadequate transport amenities (the large majority of older women in Malta do not own a driving license), and problems in finding time for educational pursuits when caring is so time-consuming. Fieldwork located a ‘masculinist’ discourse within the U3E where women are generally silenced and made passive through their invisibility (ibid.). Indeed, one could say that the learning experience provides a too firm stand on providing learning *to* women instead *for* women. On the other hand, this is not the same as saying that the U3E is a man’s world. Despite the ‘masculinist’ agenda, its membership body is characterised by a high proportion of women learners. The low percentage of older men signals strongly that for some reason the U3E is not attractive to them. The U3E is promoted through avenues – such as during health-related programmes on the broadcasting media or through leaflets at health-care centres where most of the clients are women. Health promotion courses at the U3E, despite being open to all, tend to include a bias towards women-related health issues such as weight-loss and osteoporosis. The U3E is thus miles away from having courses that are interesting to male lifestyles such as health and cooking programmes called *Pit Stops* or *Cooking for men* as is the case in Australia (Golding 2014).

Third Ageism The movement for older adult learning in Malta celebrates and promotes its ethos at the expense of older and more defenceless people – namely, those in the fourth age. It is assumed that only mobile and healthy elders are capable of engaging in educational classes, and no effort is made to reach out to those persons who due to various physical and mental difficulties are precluded from reaching classroom settings. At the same time, the field is devoid of efforts to link older adults with younger and older peers in intergenerational education. The underlying assumption here is that children, the middle-aged, and old-old persons (circa aged 75-plus) have little, if any, contributory potential towards third-age learning. Late-life education follows Laslett’s (1989: 4) definition of the ‘third age’ as a “period of personal fulfilment, following the second stage of independence, maturity, responsibility, earning, and saving, and preceding the fourth age of final dependence, decrepitude and death”. As a result, the goal is to target older adults who are young-old, able-bodied, and mentally fit. However, there are significant numbers of young-old persons facing mobility and mental challenges. Even at a relatively young age, many a times well before statutory retirement, many older adults experience complications from strokes, diabetes, and neurological diseases so that their functional mobility and intellectual resources become seriously limited. Moreover, old-old persons who experience significant mobility and mental problems, even to the extent of having to enter residential and nursing care homes, may still harbour and strive for a ‘third-age’ lifestyle.

23.4 Conclusion

Malta must aspire toward ensuring that access to learning throughout the life course is perceived as a human right, while strongly guaranteeing adequate learning opportunities in later life as a central objective in both government and local council policies. On a national level, there is an urgent need for a national policy on lifelong learning that includes a sound emphasis on later life. This framework must be guided by a rationale that reinstates lifelong learning in the values of social levelling, social cohesion, and social justice (Formosa 2002, 2011, 2012d). It is the duty of the state to secure sufficient provision and sufficient resources for late-life education, where financial support is significantly reweighted in favour of part-time provision. On the other hand, on a more local policy level, one has to make sure that Local Councils lobby the central government to be awarded an explicit role and responsibility in the planning, coordination and financing of age-related services including adult and late-life learning. In partnership with third sector agencies, Local Councils must take the role of learning hubs that bring all the “providers (public, private, and voluntary) together, to coordinate resources ... and promote learning among older people” (McNair 2009: 17). Local Authorities must join forces to prepare an explicit policy statement on older learners that sets and monitors targets for participation. There warrants as broad a range as possible of community learning opportunities for older adults through collaboration between education and other regional services ranging from health and social services to leisure organisations. Financial support and fee policies should be designed to help those with least initial schooling and income. The coupling of national and local policies should lead to short- and long-term goals and objectives in late-life learning. The most urgent issues include:

Widening Participation Providers must think out of the box so that late-life learning initiatives attract older adults with working class backgrounds, older men, elders living in rural regions, and housebound elders.

Formal Learning There is a need for the higher education sector to play a key role in encouraging new types of adult learning through all phases of the life course, including when older people move from full-time employment to other flexible forms of work.

Pre-retirement Education Society has an obligation toward its citizens to provide them with learning that help them plan for their third and fourth ages, that include a discussion of psychological and social strategies that lead them to improve their quality of life.

E-learning Contrary to conventional wisdom, ICT learning has much potential to improve the quality of life of older persons. In this respect, older adult education must put more effort to embed in their learning strategies in the Web 2.0 revolution.

Intergenerational Learning Such learning fosters harmony among generations. Other benefits include augmenting social capital, stimulating active citizenship, and sharing societal and professional resources among generations.

Fourth Age Learning Since learning is a human process that should also be directed towards frail older persons and informal carers. Learning initiatives must be made available, free of charge, to family relatives and volunteers involved in the care of older persons.

Only by meeting the above objectives that it will become possible for late-life education to prioritise the ‘democratic-citizen’ over the ‘future worker-citizen’ as the prime asset of post-industrial societies.

References

- Borg, C., & Formosa, M. (2013). Active citizenship and late-life learning in the community. *Lifelong learning in Europe*. <http://www.lline.fi/en/article/research/220133/active-citizenship-and-late-life-learning-in-the-community>. Accessed 13 Oct 2014.
- Borg, C., & Formosa, M. (2016). When university meets community in later life: Subverting hegemonic discourse and practices in higher education. In J. Field, B. Schmidt-Hertha, & A. Waxenegger (Eds.), *Universities and engagement: International perspectives on higher education and lifelong learning* (pp. 105–116). New York: Routledge.
- Borg, C., & Mayo, P. (2005). The EU memorandum on lifelong learning: Old wine in new bottles? *Globalisation, Societies and Education*, 3(2), 257–278.
- Bourdieu, P. (1984). *Distinction: A social critique of the judgement of taste*. London: Routledge.
- Burke, P. J., & Jackson, S. (2007). *Reconceptualising lifelong learning: Feminist interventions*. London: Routledge.
- Formosa, M. (2000). Older adult education in a Maltese University of the Third Age: A critical perspective. *Education and Ageing*, 15(3), 315–339.
- Formosa, M. (2002). Critical gerogogy: Developing practical possibilities for critical educational gerontology. *Education and Ageing*, 17(3), 73–86.
- Formosa, M. (2005). Feminism and critical educational gerontology: An agenda for good practice. *Ageing International*, 30(4), 396–411.
- Formosa, M. (2007). A Bourdieusian interpretation of the University of the Third Age in Malta. *Journal of Maltese Education Research*, 4(2), 1–16.
- Formosa, M. (2009). Renewing Universities of the Third Age: Challenges and visions for the future. *Recerca*, 9, 171–196.
- Formosa, M. (2010a). Older adult learning in Malta: Towards a policy agenda. *Mediterranean Journal of Educational Studies*, 15(1), 61–85.
- Formosa, M. (2010b). Universities of the Third Age: A rationale for transformative education in later life. *Journal of Transformative Education*, 8(3), 197–219.
- Formosa, M. (2010c). Lifelong learning in later life: The Universities of the Third Age. *Lifelong Learning Institute Review*, 5, 1–12.
- Formosa, M. (2011). Critical educational gerontology: A third statement of principles. *International Journal of Education and Ageing*, 2(1), 317–332.
- Formosa, M. (2012a). European Union policy on older adult learning: A critical perspective. *Journal of Aging and Social Policy*, 24(4), 384–399.
- Formosa, M. (2012b). Education for older adults in Malta: Current trends and future visions. *International Review of Education*, 58(2), 271–292.

- Formosa, M. (2012c). Education and older adults at the University of the Third Age. *Educational Gerontology*, 38(1), 1–13.
- Formosa, M. (2012d). Critical geragogy: Situating theory in practice. *Journal of Contemporary Educational Studies*, 63(5), 36–54.
- Formosa, M. (2013). Policies for older adult learning: The case of the European Union. In J. Field, R. Burke, & C. Cooper (Eds.), *The Sage handbook on aging, work and society* (pp. 461–476). London: Sage.
- Formosa, M. (2014). Four decades of Universities of the Third Age: Past, present, and future. *Ageing and Society*, 34(1), 42–66.
- Formosa, M. (2015). *Ageing and later life in Malta: Issues, policies and future trends*. Malta: Book Distributors Limited
- Freire, P. (1970). *Pedagogy of the oppressed*. New York: Continuum.
- Golding, B. (2014). Men's sheds: A new movement for change. In B. Golding, R. Mark, & A. Foley (Eds.), *Men learning through life* (pp. 113–128). Leicester: NIACE.
- Laslett, P. (1989). *A fresh map of life: The emergence of the third age*. London: Macmillan Press.
- McNair, S. (2009). *Older people's learning: An action plan*. Leicester: NIACE.
- National Statistics Office. (2006). *The university of the third age*. Malta: National Statistics Office.
- National Statistics Office. (2014a). *Census of population and housing 2011, volume 1: Population*. Malta: National Statistics Office.
- National Statistics Office. (2014b). *World population day*. Malta: National Statistics Office.

Chapter 24

Namibia

Miriam Hamunyela and Haaveshe Nekongo-Nielsen

Education for older adults is a new phenomenon in Namibia. Having gained independence in 1990, Namibia inherited what Freire described as a ‘domesticating’, ‘dehumanizing’ and ‘oppressive’ (Freire 1993) educational system, which devalued and demoted the general wellbeing of the Namibian people. In that oppressive educational system, formal adult education was insignificant. One of the negative legacies of the apartheid era is a segmented society, of which the citizens were deliberately provided with an unequal, racially and ethnically based education system (*Bantu Education System*) to the detriment of blacks (United Nations Institute for Namibia 1986; Angula and Lewis 1997). The combination of the fragmented education system mandated by apartheid policies resulted in severe educational deficits for children and adults. Even though some limited research has been conducted on issues of adult education and there are now a number of policies related to it, the authors argue that the field continues to be less valued and underdeveloped, and education for older adults in Namibia is non-existent.

M. Hamunyela (✉)
Department of Lifelong Learning and Community Education,
University of Namibia, Windhoek, Namibia
e-mail: mhamunyela@unam.na

H. Nekongo-Nielsen
Department of Student Support, Centre for External Studies,
University of Namibia, Windhoek, Namibia
e-mail: hnnielsen@unam.na

24.1 Country Brief

Namibia covers a geographic area of 825,418 km² (Ministry of Basic Education, Sport and Culture (MBESC) 2004). It borders Angola to the North; South Africa to the South; Botswana and Zambia to the East and the Atlantic Ocean to the West. Namibia has three recognized ethnic groups (Black, White and Mixed) and according to the 2011 census, the population stands at 2,104,900, consisting of 1,021,300 (49 %) males and 1,083,600 (51 %) females (Namibia Statistics Agency (NSA) 2012a).

Before discussing adult education in the country and the need for education for older adults, it is worth looking at Namibia as a country. Namibia was previously called South West Africa (SWA) and became a German protectorate in 1884. It was during this period when missionaries arrived in the country, introduced Namibians to Christianity and identified the literacy need of local people to be able to read the Bible. Between 1905 and 1930 a number of mines (especially diamond mines) were opened in the country and started to recruit natives through what came to be known as the contract labour system (Hishongwa 1992). That system required Namibians to know how to read and write because they needed to fill in forms and understand signs in the mines.

Even though people needed basic literacy skills (reading, writing and numeracy) there was no provision of literacy classes of any sort, except of course ad-hoc activities of the missionaries and continuing education programmes of the churches (South African Institute of Distance Education (SAIDE) 1999). It means many people learned basic literacy skills on their own initiative and in their own spare time. Since only men were allowed to participate in the labour system, it also means more men learned to read than women, except those women who were active in the Christian movement. Moreover, as the apartheid system intensified, a segregated education system had been created and schools were established based on one's ethnic origin. It was only after a political settlement was reached in 1988 within the framework of UN resolution 435 of 1978 that Namibia obtained its independence in 1990. After the independence, education in Namibia became equal and for all.

24.2 History and Provision of Adult Education in Namibia

The history of adult education in Namibia goes back to the work of missionaries, with the first adult literacy primer published by the Finnish Lutheran Missionaries in 1876. It was not until 1981, that Ellis (1981) highlighted the importance of adult education for an independent Namibia. After independence, education in Namibia has come to be regarded as a human rights issue. Article 20, section 1 of the Namibian constitution provides that "All persons shall have the right to education" (Ministry of Information and Broadcasting 1991).

As part of its developmental goals, the Ministry of Education (MoE) introduced a National Literacy Programme in Namibia (NLPN) in 1992 in order to provide basic literacy and numeracy skills to previously disadvantaged adults and out of school youth to enable them to contribute more effectively to national development (MoE 2006, 2010). As stipulated in the National Plan of Action of 2001–2015, "... NLPN aims to achieve a total youth and adult literacy rate of 90 % by 2015".

Today Namibia is endowed with many institutions and organizations providing adult education for a number of reasons. Therefore, to take stock of the provision and progress in adult education in Namibia is complicated, because the field is so wide and fragmented. The services happen in so many ways, in so many places, by so many organizations, and in different forms. Some providers do not even realize that they are offering adult education.

The provision of adult education is spearheaded by the Ministry of Education through the Directorate of Adult Education (DAE) with the ultimate aim of coordinating adult education activities in the country. The goal of the DAE is to contribute to Namibia's Vision 2030 for the country to become a fully literate nation by 2030. The DAE satisfies its mission of promoting a literate nation mainly through the NLPN, the Adult Upper Primary Programme, and the Adult Skills Development for Self Employment, as well as through equipping Community Learning and Development Centres (SAIDE 1999).

As a result of these efforts, in September 2013, Namibia was awarded a Confucius prize by UNESCO for an excellent national literacy programme and for its efforts to promote literacy and non-formal education among disadvantaged adults with the view to improve their quality of life. In Dyakungha's (2013, p. 3) words the NLPN "provides learning opportunities for out-of-school youth, illiterate and disadvantaged adults, particularly women, enabling them to acquire knowledge, skills and positive attitudes in order to improve the quality of lives and to participate in social, economic and national development".

In addition to the DAE, adult education is also provided by tertiary institutions in the country, namely, the University of Namibia (UNAM) and the Polytechnic of Namibia (PON). The UNAM offers diplomas and degrees (Masters and PhD) qualifications. The Polytechnic of Namibia provides in-service training especially to entrepreneurs and business people with the aim of enhancing the capacity of these individuals for the purpose of increasing and improving productivity. Even though adult education is provided at tertiary level, research activities in the field are scant, but the number of people pursuing graduate level studies in the field of adult education is steadily increasing. Besides the University and the Polytechnic, the Namibian College of Open Learning (NAMCOL) provides adult education programmes through open and distance learning (ODL) modes.

In addition to public provision, there is a massive provision of adult education by non-governmental and civil society organizations in Namibia as well as some private sector entities. The details of educational activities and results achieved are

stipulated in *A Guide to Civil Society in Namibia* (Keulder and Kisting 2012). This guide noted that 26 organizations provide adult education for personal and community development; 37 provide health related (22 HIV/AIDS, and 15 general health) education; 14 provide adult education on human rights and democracy; seven provide gender related education; three provide disabilities related education; three provide arts and culture related education; and two provide agricultural related education.

24.3 Adult Education Policy Development in Independent Namibia

Upon independence in 1990, Namibia worked to develop inclusive laws and educational policies as well as investing in all age groups of people. In developing its educational policy, the new Government for Independent Namibia recognized the importance of lifelong learning.

In this respect, a number of policy documents for basic formal and non-formal education were developed. These include the famous “Developmental Brief for Education, Culture, and Training of 1993: Towards Education for All”; Namibian Education Act, Act No. 16 of 2001; the Education and Training Sector Improvement Plan (ETSIP); Planning for a Learning Nation—Programme Document (2006–2011); the Policy Guidelines for the Second Phase, 1996–2000 of the National Literacy Programme in Namibia; the National Policy on Adult Learning 2003; the Namibia Vocational Education Training (VET) Policy 2005; the Lifelong Learning Policy Framework for Namibia 2010; the draft ODL policy of 2007 and the National Gender Policy of 1997.

Moreover, the Policy on Information for Self Reliance and Development was adopted in 1997 and some achievements in the areas of information and communication technology have been noted. To date there are a number of community libraries located in rural areas and community development learning centres as well as a network of teachers’ resources with internet connections, providing internet access free of charge to many rural and urban dwellers across the country.

It was after development of the 1993 policy guidelines for the national literacy programme and the proclamation of the Education Act No. 16 of 2001 when the nation realized that some sort of policies are required for guiding adult education activities in the country; hence, the National Policy on Adult Learning of 2003, the first in the field of adult education. Despite that however, Ellis (2004), working in the Ministry of Education at the time, discussed the challenges facing adult learning in the country. He noted the low status accorded to the planning and development of adult education, even after the National Policy on Adult Learning was adopted in 2003. This is also despite the fact that many bodies (government, private and NGOs) are engaged in some form of adult education programmes and/or activities (Ellis 2004; Keulder and Kisting 2012).

24.4 The Importance of Adult Education in Namibia

Statistics show that even in Namibia education is important for jobs. Like elsewhere in the world, there is a correlation between employment and education, and also a tight correlation between parents' education and children's success in education. Advocates of parental involvement in education assert that poverty tends to hit those with low educational attainment and their families the hardest (Van Wyk and Lemmer 2009). According to the 2012 NLFS of those with primary education, 29.7 % are unemployed and the unemployment rate for those with senior secondary education is 26.2 %, while the unemployment rate of people with post-secondary education is 4.7 %. Thus, it is understandable that the Namibian adult education provision is focusing more on people of working age. Even though there are institutions in Namibia, such as the University of Namibia, which increased the retirement age to 65 years (UNAM 2010), the Namibian Government encourages early retirement, discouraging people to work beyond 60 years of age, in order to free employment opportunities for young people. However, some ministries (education as well as health and social services) are found to recall retired teachers and nurses respectively back to service due to lack of skills in those fields.

Thus, education in Namibia is designed to curb the re-occurrence of uneducated and uneducable, as well as unemployed and unemployable citizens, committed to providing quality education for all (Ministry of Education and Culture (MEC) 1993). The provision of quality education cannot happen in isolation from adult education, and the importance of co-operation and participation of all stakeholders is crucial in the reforming of education. This understanding made the new government open opportunities for Namibia civil society organizations to cooperate in government programmes and broad strategies for long-term national development as contained in Vision 2030 and the achievement of Millennium Development Goals (Keulder and Kisting 2012).

24.5 Education for Older Adults

Since independence Namibia has been experiencing alarmingly high unemployment rates, currently standing at 27 %, 4 % of the economically active population, with 49 % of young people between the ages of 20 and 24 having no work. In contrast, the Namibia Labour Force Survey's (NLFS) of 2012 findings indicate the unemployment rate of people between 50 and 54 years of age as 13 % (NSA 2013). Furthermore, the same survey showed that 31.8 % of Namibia's female labour force, and 22.9 % of the male workforce, are jobless. Even though the Namibian population of people 60 years and older has been steady at 7 % since 1991, life expectancy in the country has improved from 61 years of age in 2000 to 65 years of age in 2011 (NSA 2012b; Nunuhe 2014).

With the improvement in social services such as the non-contributory and non-testing old age pension and the reduced hospital rates for pensioners, Namibians are likely to live longer. Moreover, Namibian older adults (aunts, uncles and grandparents) play a major role of extended kinship care. It is estimated that about 30–40 % households are headed by people of 60 years of age or older and largely female, with some northern regions standing at 45 % (Ministry of Gender Equality and Child Welfare (MGECW) 2007a, b). In particular, single parents are more likely than couples to seek help for childcare from their extended family.

Although some researchers (e.g. Amoateng et al. 2004) claim that grandparenthood is more common and prominent among blacks living in rural areas, Smith et al. (1998) argue that grandparents are becoming more frequently involved in parenting and childcare across race and ethnicity lines. Research conducted by the authors in 2013 indicates that childcare places a huge responsibility and strain on grandparents. They experience poor health and emotional problems. Most of them lack the financial resources to meet the needs of their grandchildren of school-going age and thus exhaust their pension in the effort to look after their grandchildren. Therefore, older adults need practical support including educational services for them to be able to live more healthful and productive lives.

Across the globe many countries provide educational and social programmes for older adults (Findsen and Formosa 2011). In Namibia there are no learning/educational opportunities aimed at custodial grandparents so that they are enabled to empower themselves and assist their children with school work. The only programme is the NLPN, and other NGOs and private sector run/supported programmes which mainly cater for adults who are still in the workforce.

The question we, Namibians, therefore should ask ourselves is “Why should we educate older adults?” Given the increase in life expectancy and that the 59.2 % of the young generation of today would become older in 40–60 years to come, there is a need to officially acknowledge and support the role of grandparents by building their capacities to enhance the quality of life of themselves and their grandchildren (who are tomorrow’s leaders). Furthermore, Namibian society is becoming more sophisticated, with many activities requiring adults of all ages to be literate. Therefore, people should be enabled to learn and apply skills to achieve their goals and improve their quality of lives.

24.6 A Namibian Case Study: Learning Needs of Older Adults

While in many countries of the developed world education for older adults is fast growing (Findsen and Formosa 2011), this concept is yet to be introduced in Namibia. To establish the extent to which education for older adults is needed in the country, in 2013, the authors conducted a qualitative study among older adults in two of the most populous settlements of Namibia (Ohangwena and Oshana regions).

The study's purpose was to investigate the type of education needed by older adults which could sustain them and make their rural lives comfortable. The sample of the study consisted of 73 respondents (63 from Ohangwena region and 10 from Oshana region), made-up of 57 females and 16 males, selected using a simple random sampling technique. Data was collected through semi-structured oral interviews and group discussions. The respondents' age ranged from 60 to 96 years with an average age of 71 years and all were receiving an old age pension. On average there were 6.2 persons living in the household of an interviewee, of which 3.2 persons per interviewee were of school-going age and only 0.9 persons per interviewee were employed. Sixty-two out of 73 respondents attended formal schooling and their education varied between Grades 2 and 10. Six of the remaining 11 respondents, all from Ohangwena region, had never attended school in their lives and thus could not read and write. Five respondents learned reading and writing skills through the NLPN.

In analysing and interpreting the collected data, the authors have been informed by Freire's critical pedagogy and critical educational gerontological theory (Freire 1993; Bengtson et al. 2009). The next sections present a summary and discussion of the findings of the study. The study found that there are still a significant number of school-going children residing with their grandparents who are older than 60 years of age. That means, older adults continue to be involved in the upbringing of school-going children. The implication is that these older adults need to be further strengthened so that they can take care of themselves and be able to shape the future of their grandchildren. Respondents were asked to indicate the kind of support and skills they needed in order to carry out their daily activities.

24.6.1 Agricultural/Farming Skills

The majority of respondents (44) indicated that they wanted programmes that would teach them agricultural skills of cattle farming, vegetable gardening and how to preserve food for later use. Given that 58 % of Namibians still live in rural areas, it is not surprising that the majority of respondents are interested in programmes that will provide them with agricultural skills and technical know-how. The findings of the study signify that older adults are in need of this noble objective of literacy skills for poverty eradication.

24.6.2 Reading and Speaking English

Thirty-one respondents wanted to learn to speak, read and even write English. They advised that counting skills should also be included in English language lessons. They said that they needed to know how to read and count in order to read instructions on their medicines, to read prices in shops and verify receipts from shops, read

and verify balances on their bank accounts and be able to count change they receive from people who sell at the pension pay points.

Even though some respondents regarded themselves too old to learn English language, their responses indicated the importance of having this skill. Namibia has opted for English as an official language and English is also the instructional language in schools. With about 40 % of older adults heading households and taking care of school-going children, they have the need to learn and know the language of instruction so that they are able to be helpful to the younger learners residing with them.

24.6.3 Leadership/Management Skills

Twenty-eight of the respondents were in need of leadership and management skills. Older adults find themselves in rural areas with not many young adults or middle-aged around, as these age categories tend to migrate to urban areas where there are better prospects for employment. As a result, and when community development projects are established in the villages, there is none to take lead other than older adults, and they find that leading people, especially rural people, is no easy task.

24.6.4 Operating Cell Phones

Related to operating communication and technology devices, nine of the respondents indicated the need of knowing how to read messages on cell-phones and operating cell-phones. This is the age of information, the age of voting machines, bank accounts, ATMs, mobile phones and requires everyone to be multi-literate, including older adults. It is reported that 83 % of Namibians have access to radios, 48 % own televisions and about 88 % of Namibians own cell phones (NSA 2012c). As Meekulu Ningeni (an old woman of over 80 years of age) illustrates "... cell phones are the in-thing in Namibia across all ages". Learning to operate these devices by older adults becomes a necessity rather than a luxury. In the national elections of November 2014 the Electoral Commission was busy educating Namibians (including older adults) how to use the voting machine, the first time of its use in Namibia.

24.6.5 Other Skills Required by Older Adults

Older adults also demand to be provided with skills ranging from financial literacy and management to cooking. Twenty-four respondents expressed the need for financial literacy and management as well as savings skills. Eight respondents were

interested in taking care of the vulnerable people in their communities. Four of the respondents expressed the need to learn how to take care of their own health and seven wanted to teach others in their communities. Participants were of the opinion that if they were trained in construction they would be able to build their own rooms in their homesteads. Further, two respondents expressed the need for the correct way of preparing nutritious meals for their families and friends.

24.7 Conclusion

This chapter took stock of the Namibian adult education landscape, highlighting achievements and challenges and identifying the shortcomings of the adult education provision in Namibia. Adult education is probably the most developmental field there is today, versatile and very accommodating in addressing a variety of needs for a variety of situations. According to Coetzee (2013), adult education and training is a response to the dynamic impact of globalization on countries' national economic goals. Adult education addresses the skills deficit, increases investment in skills and production, promotes socio-political development, and thus an important tool for poverty eradication. Over the years, poverty eradication, through health promotion, income generation and literacy skills development have been addressed by using adult education methods. As a result, countries have realized the competitive value of making quality and focused adult education, training and development as interventions to national development. Namibia needs to catch up with the rest of the world, especially in the area of knowledge production in the field of adult education and development, including education for older adults.

Thus, as a result of the empirical research, the authors are convinced that the purposes of adult education in Namibia need to change focus to also address the aspirations for older adults. The research results highlighted areas where older adults of today are struggling and conclude that if Namibia has to improve people's quality of life and enable all to enjoy life, providing lifelong learning for all should be the best way to go. It also means, since Namibian people of retirement age tend to move away from urban areas and retreat to rural areas, educational programmes for this age group must be carefully designed, to meet the needs of people in rural areas and fit to be delivered under rural conditions.

The 2013 research findings indicate that older adults in Oshana and Ohangwena regions in Namibia are aware of their own learning needs and thus they proposed appropriate learning activities. When adults are aware of their own learning needs, they are the best suited people to propose learning activities in order to contribute to their personal development and consequently to the development of their communities. In this way educational providers in tune with emergent voices of older adults will be able to meet the learning needs of this target audience.

References

- Amoateng, A. Y., Richter, L. M., Makiwane, M., & Rama, S. (2004). *Describing the structure and needs of families in South Africa: Towards the development of a national policy framework for families*. A report commissioned by the Department of Social Development. Pretoria: Child Youth and Family Development, Human Sciences Research Council.
- Angula, N., & Lewis, S. G. (1997). Promotion democratic process in educational decision-making: Reflection from Namibia's first 5 years. *International Journal of Educational Development*, 17(3), 222–249.
- Bengtson, L. V., Silverstein, M., Putney, M. N., & Gans, D. (2009). *A handbook of theories of aging*. New York: Springer.
- Coetzee, M. (Ed.). (2013). *Practising training and development in South African Organisations* (2nd ed.). Cape Town: Juta and Company Ltd.
- Dyakungha, T. K. (2013, September 8). *Report on the international literacy day celebrations in Mariental (Hardap region)*. Unpublished Speech.
- Ellis, J. (1981). *Basic adult education in Namibia after independence*. Manchester: Manchester University Press.
- Ellis, J. (2004). Making space for adult education in independent Namibia. *Convergence*, 37(3), 105–113. ISSN 00108146.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Rotterdam: Sense Publishers.
- Freire, P. (1993). *Pedagogy of the oppressed*. New York: The Continuum Publishing Company.
- Hishongwa, N. (1992). *The contract labour system and its effects on family and social life in Namibia: A historical perspective*. Windhoek: Gamsberg Macmillan.
- Keulder, T., & Kisting, N. (2012). *A guide to civil society in Namibia* (2nd ed.). Windhoek: Namibia Institute for Democracy.
- Ministry of Basic Education, Sport and Culture. (2004). *National report on the development of education in Namibia*. A paper presented at the International conference on education in Geneva, 2004 by the Minister of Education, Mr John Mutorwa.
- Ministry of Education. (2006). *Education and training sector improvement plan: Planning for a learning nation—programme document (2006–2011)*. Windhoek: Ministry of Education.
- Ministry of Education. (2010). *Lifelong learning policy framework for Namibia* (Final Draft). Ministry of Basic Education & Culture (2001).
- Ministry of Education & Culture. (1993). *Towards education for all: A development brief for education, culture and training*. Windhoek: Gamsberg MacMillan.
- Ministry of Gender, Equality and Child Welfare. (2007a). *Namibia national plan of action for orphans & vulnerable children* (Vol. 1). Windhoek: Government of the Republic of Namibia.
- Ministry of Gender, Equality and Child Welfare. (2007b). *Namibia Community and Household Surveillance (CHS): Round 2*. Windhoek: Government of the Republic of Namibia.
- Ministry of Information & Broadcasting. (1991). *The constitution of the Republic of Namibia*. Windhoek: Ministry of Information & Broadcasting.
- Namibia Statistics Agency. (2012a). *Namibia 2011 population and housing census indicators*. Windhoek: NSA.
- Namibia Statistics Agency. (2012b). *Population and housing CENSUS main report*. Windhoek: NSA.
- Namibia Statistics Agency. (2012c). *Namibia Household Income & Expenditure Survey (NHIES) 2009/2010*. Windhoek: NSA.
- Namibia Statistics Agency. (2013). *The Namibia labour force survey 2013 report*. Windhoek: NSA.
- Nunuhe, M. (2014, August 15). Over 400,000 lifted out of poverty. *New Era Newspaper*. Windhoek: NewsPrint, p. 1.
- SAIDE. (1999). *National Literacy Programme in Namibia (NLPN): Ministry of Basic Education and Culture*. SAIDE country visits conducted in 1999. Windhoek: SAIDE.

- Smith, A. B., Dannison, L. L., & Vach-Hasse, T. (1998). When grandma is mom. *Childhood Education*, 75(1), 12–17. South Africa: Family Life. Available at <http://family.jrank.org>
- United Nations Institute for Namibia. (1986). *Namibia perspectives for national reconstructions and development*. Lusaka: United Nations Institute for Namibia.
- University of Namibia. (2010). *The human resources policy*. Windhoek: UNAM.
- Van Wyk, N., & Lemmer, E. (2009). *Organising parent involvement in schools*. Cape Town: Juta and Company Ltd.

Chapter 25

Netherlands

Jumbo Klercq

25.1 Historical Formations Influencing Later Life Learning

The history of senior education in the Netherlands can be approached from three angles – namely, (i) existing imaging and changes therein, (ii) actual participation of older people in education, and (iii), development of programmes. It is clear that these angles are related to each other and influence each other. Indeed, the pursuit of personal development and the desire to understand society better does not automatically lead to participation in education. Many seniors mainly choose hobby, leisure and language courses. Whether this offer really meets their needs is not known. Seniors today want to be seen as enjoying life, being active and healthy. Many others feel too old to learn. Sometimes it's often a long time since they have gained education experience. Perhaps it is also simply that they believe that learning is for older persons. In 1989, feeling (too) old proved to be one of the most common reasons for not taking part in education. Table 25.1 demonstrates participation rates of the persons aged in the 55–64 cohort by level of education.

It is probable that those who do not participate in the group with low education levels are very often those with limited skills and knowledge, frequently also facing health problems. When they have worked, this was mostly in physical demanding jobs with unfavourable working conditions.

Prior to the 1980s there was not or hardly been attention to senior education. Learning was seen as a particular useful activity for younger adults. Once retired, one was supposed to enjoy leisure time before ageing and the age-related possibilities for physical and mental frailty. Although one also believed that it was important for the elderly remain to the time, this was not transformed into new learning needs and learning activities, it was just seen as a personal issue. Being 'old' was often

J. Klercq (✉)

The Elephant Learning in Diversity, Nijmegen, The Netherlands

e-mail: jumbo.elephant.klercq@gmail.com

Table 25.1 Employment rate of older workers (age 55–64) related to level of education in 2011 (%)

Education level	Total	Men	Women
Low	51.6	62.9	40.5
Middle	71.0	77.1	64.9
High	81.7	84.6	78.8

Source: Cramer and Van der Kamp (1989)

Table 25.2 Number of elderly people experiencing disability by age, 1987 (in %)

	55–64	65–74	75+	Total
Strongly hindered (daily activities) due to a disability	11.8	12.4	21.2	14.2
Can only move with assistance outside the home	1.1	2.9	12.8	4.5
Can poor reading	2.7	2.8	9.9	4.5
Can see poorly in the distance	0.7	1.6	5.6	2.2
Can poor hearing	1.8	3.1	9.1	4.0

Source: Sociaal Cultureel Planbureau (2015)

seen as ‘disabled’ (see Table 25.2). In 1987, it was also assumed that about 10 % of persons aged 60-plus have been clearly interested and motivated to participate in educational activities. There is no doubt that late-life learning in the Netherlands was particularly developed in the 1980s. However, there was one exception – namely, the successful pre-retirement courses which date back to the 1960s. The development of these courses was closely linked to the emission of older workers in business life and the subsequent boom in popular early retirement schemes.

More than 10 % of all retirees attended, and are still attending, often with their partner. Pre-retirement education (PRE) became a kind of orientation of further (learning) activities. The tradition of 4 or 5 days pre-retirement courses is very strong. Indeed, they have survived even when the subsidy has been terminated end of the 1980s. The employers are (still) willing to pay or participation is given as an opportunity by collective labour agreements. By the end of the 1980s, PRE courses became more interactive and participants became more interested in subjects as health issues, housing and active ageing. As follow up, a consortium of Dutch organisations started to offer a wide range of Ageing Well courses based on the United Kingdom model based on the principles of peer-education (developed and organised by older persons by older persons). Later on, orientation on housing became also a very successful topic, leading to a strong increase of senior citizens’ who want to set up their own communal living projects. Group living for seniors became popular in the 1990s. More recently, healthy lifestyle activities like fitness, dance, yoga and tai chi have also gained in popularity.

Presently, the participation of older persons in educational pursuits in the Netherlands is low. The low participation rate is mainly caused by the low education level of current cohorts of older persons. In Table 25.3, the generations effects between the years 1985 and 2010 are clear.

Table 25.3 Population 55 years and over by education level and gender (%)

	1985	2010
<i>Men</i>		
Basic level (no or unfinished stage 1)	40.9	20.2
Advanced lower level (completed LBO or 3 years of HAVO/VWO)	21.4	22.6
Secondary level (completed HAVO/VWO, MBO/VET)	27.7	36.9
Semi-level (completed college, bachelor wo)	6.9	12.6
Higher level (completed wo)	3.0	7.8
Total	100.0	100.00
<i>Women</i>		
Basic level (no or unfinished stage 1)	61.6	31.0
Advanced lower level (completed LBO or 3 years of HAVO/VWO)	20.2	32.9
Secondary level (completed HAVO/VWO, MBO/VET)	13.7	23.6
Semi-level (completed college, bachelor academic)	3.9	10.3
Higher level (completed academic)	0.7	2.3
Total	100.0	100.0

Source: Sociaal Cultureel Planbureau (2015)

Seniors are allowed to make use of all formal adult education in the Netherlands and many do. However, the majority of them belong to the more privileged members of society, having more education and higher incomes. This is mainly due to the fact that students must pay a considerable fee and that senior citizens in the Netherlands are not entitled to grants. The current situation is quite well compared with European Union. Whilst in 2011 8.4 % of persons aged in the 50–74 cohort in the Netherlands participated in (formal) education and training, the figure for the European Union stood at 4.4 % in the same year (Eurostat 2015). The same survey indicated that 27 European Union member states as much as 36.5 % of the population aged 50–64 were participating in some kind of formal learning in 2011. A Dutch survey on informal learning pointed out that persons aged in the 55–65 age cohort participated in less training programmes when compared to younger people aged in the 25–35 age cohort (CBS 2014). However, Dutch senior education is mainly non-formal/informal and organised around learners needs. This trends commenced in the late 1970s with life-story telling groups ('age is at any age'), followed by study circles (based on programmes in Sweden) and memory trainings (based on programmes in Switzerland) in the mid-1980s.

In the 1990s, the development of late-life learning in the Netherlands was at its peak. During this period, the focus of learning in later life is changing again, aiming more towards training for voluntary work (especially in relation to home visits to the elderly), biographical learning, storytelling, intergenerational projects and reminiscence activities. Non-formal senior education was going strong and offered by a wide range of organisations. Although successful, many projects disappeared due to

re-organisational issues and budget cuts. At the same time, seniors were also actively participating in voluntary work in the Netherlands, and a wide variety of educational programmes are aimed at increasing their competencies and training new skills for volunteers. Indeed, for many years voluntary work has been considered as an excellent form of informal senior education. It is noteworthy here that in the 1990s participation of seniors increased in all types of education. Computing courses and Seniorweb were the most popular, followed by participation in language courses at *volksuniversiteiten* (folk-high-schools) as well as HOVO-activities which are the Dutch equivalent of Universities of the Third Age.

25.2 Significant Organisation in Late-Life Learning

As pointed out before many projects have been disappeared as a result of discontinuation of funding and budget cuts, while others have been stabilized to an established range of educational activities. Some initiatives which have survived include:

- *HOVO* offers courses at an academic level to people aged 50-plus. It is aimed at those who like to explore a new field of science, to pick up an old scientific hobby or to keep up with the newest developments in their own field of science. At the moment there are 16 HOVO institutions, together approximately 25,000 students. Umbrella organisations include HOVO-Nederland, a national federation.
- *Gilde Nederland* ('guild' projects) is an umbrella organization. In this organization, many local guild projects are connected. In Gilde projects people aged 50-plus are active as a volunteer, putting their knowledge and expertise freely available to individuals, non-profit organisations and entrepreneurs. The activities of the consultants are limited to giving advice, not providing cheap labour. They also organize city tours, nature walks and bike rides where a small fee is charged. There are 65 municipalities that include a Gilde project.
- *PUM Senior Experts* is a non-profit organization that companies from developing countries and emerging markets advises that no commercial consultancy can afford. Retired Dutch professionals are sent to companies at their request. It encourages locally entrepreneurship, self-reliance and sustainable development of SME's on site. These senior experts are performing specific, short-term consulting projects in the workplace and help companies to build sufficient knowledge to become the engine of the local economy. PUM was founded in 1978 by NCW employers' organization. It has a network of 3200 volunteers worldwide who carry more than 2000 projects annually over 70 countries.
- *SESAM Academy* consist of almost 80 SESAM Consultants aged 55-plus who put their experience and knowledge unselfishly to support in the field of administrative and organizational activities for volunteer organizations. The project started in 2002 following the example of the Project Leadership Institute for Active Aging (United States). The SESAM is a financially independent foundation since 2006.
- *Senior Web* wants everyone to experience the capabilities of the computer and internet. Starting point is that this is done by and for older people. SeniorWeb is

a non-profit organization whose mission is the participation and fulfilment of all seniors in the digital society. SeniorWeb is a national association of approximately 3000 volunteers, more than 400 learning centres and more than 140,000 members.

- *Levensloopacademie* is an organisation of network partners developing life course education for persons aged 45-plus (labour midlife resourcing), 65-plus (health and care), and 75-plus (new age).

25.3 Actual Developments

In recent years, there are hardly innovative developments to report. However, there are some crucial developments which include a huge growth of use of internet and social media, growing intergenerational approach, retaining and re-integrating older workers in the labour market, and a growing group of older migrants.

25.3.1 *Use of Internet and Social Media*

In 2012, one third of persons aged 75-plus surfed the internet, with more male than female users. This demonstrates that internet use has increased substantially among older persons, with 76 % of the Dutch population aged 65–75 year surfing the internet in 2012. This share has increased rapidly in recent years, in 2006 it was only 42 % (Fig. 25.1).

In 2012, internet use among older persons aged 75-plus, in 2012, measured for the first time there is something underneath. Among the 65 almost everyone uses internet. All were virtually using e-mail 66 % is looking for information on internet. Older online users used the web in addition to e-mail above to search for information and banking. In some instances, they also used the internet to book travel arrangements, read the newspaper, watch TV and listen to radio via the internet. One also notes that the use of social media is increasing among older people. Facebook is getting more and more popular. A new initiative is *Goed voor Senioren* (Good for Seniors), an online interactive community which is mainly run by seniors themselves.

25.3.2 *Intergenerational Learning*

The national initiative *De buurt van alle leeftijden* (Neighbourhood of All Ages) in 2000–2003 gave a huge boost to an intergenerational learning activities. In cooperation with various local organizations, intergenerational activities were developed under this pilot. The programme was promoted through articles, workshops, conferences and a website. It was initially strongly influenced by well-developed practices and research in the United States where both older and younger people joined

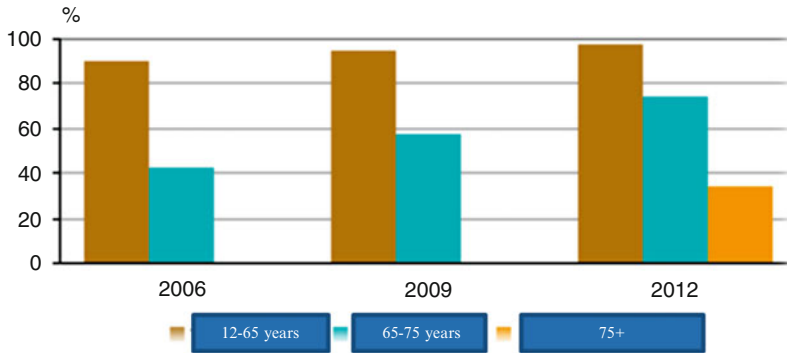


Fig. 25.1 Surfing on internet (%) (Source: Centraal Bureau voor Statistiek (2015))

together in action. However, this approach has had limited attention to generational differences, both in norms and values and in way of communication. Gradually, the Dutch approach was developed: a society in which more than three generation cohorts existing simultaneously for the first time in history and who should share all social and economical sources together. The follow up project, *Zilveren Kracht* (Silver Force), started in 2006 and was meant to strengthen the position of the older generation focusing on the awareness and utilization of the vast potential of the elderly and social combats negative stereotypes surrounding ageing. In 2010, the direction of the program changed to local consultancy in various municipalities.

25.3.3 Retaining Older Workers

Around 2000 the Netherlands was one of the EU countries with the lowest participation of older workers in the EU and a growing number of seniors was outside the labour market. Therefore the government initiated the Task Force Older Workers which aims to advise and provide good ideas to keep older workers longer at work. Important recommendations of the Taskforce included (i) stimulating a pro-active life-cycle approach with a focus on sustainable employability and workability for all age groups; (ii) utilising the institutions of decentralised social partners, like the sector collective labour agreements and the sector funds for education and training and health and safety for the promotion of sustainable employability programmes, particularly in the SME-sectors; (iii) developing a long term project subsidy program for (larger) companies and SME-sectors to stimulate age conscious personnel policies; and (iv), stimulating working longer with financial stimuli.

It is positive to note that most of these recommendations have been put in practice over the last decade. And in the meanwhile the public opinion has changed as well: longer working is nowadays highly accepted. Over the last decade impressive results have been achieved. Particularly regarding participation rates of the older workforce and the lengthening of working lives as the following table and figure show (Table 25.4).

Table 25.4 Employment rate of older workers age groups 55–59 and 60–64 (2001, 2006, 2011)

	Total		Men		Women	
	55–59	60–64	55–59	60–64	55–59	60–64
2001	48.2	13.7	66.2	20.2	29.7	7.2
2006	55.8	20.8	71.0	29.2	39.5	12.3
2011	68.2	36.0	81.7	46.6	54.6	25.4

Source: Centraal Bureau Statistiek (2015)

Moreover, there is a steady increase in participation rates for both men and women in both age groups in the period 2001–2011, even accelerating after 2006, when fundamental early retirement reforms took place. However, due to the current economic and financial crisis one fears that the number of older retirees will incline as well.

25.3.4 Older Migrants

It has long been projected that in 2015, there will be 350,000 migrants aged 55-plus from non-western countries living in the Netherlands. Older migrants are a vulnerable and growing group. They have compared to native elderly a poor health and a lower welfare. However, older migrants is a term which does not justify the diversity in this category. There are many cultures and subgroups. Initially one thinks of Turkish and Moroccan, but there are many different cultures represented, such as Antillean, Moluccan, Chinese, Indian and Surinam. There are huge differences in education and literacy level. For instance, 50 % of Turks and Moroccans have primary school or less, among Surinam and Dutch Antilles it is 20 %. Among native Dutch this is 6 %.

Functional illiteracy among older migrants is 60 % (Turkish men) – 90 % (Moroccan women). However, their limited command of Dutch language is an additional complicating factor because communication with people outside the family is strong more difficult. Acquire new knowledge of people from these groups through oral transmission by trusted individuals. Pluspunt Expertisecentrum Rotterdam is a good example of an institution which realises informal education for older migrants, while NOOM (network of organisations of older migrants) is an organisation that represents older migrants as a group at national level.

25.4 Dutch Adult Education

Self-funded education involves training for which the expenditure is incurred by the citizen, the trainee, the employer or the benefits agency. In such programmes, nearly 1.3 million persons aged between 17 and 64 years participate. This is as much as

12.2 % of the total population in that age group. The largest part of the non-funded education is concerned with postgraduate education. Self-funded institutions are the main players, providing some 85 % of these courses. In total we talk about approximately €3.2 billion in the education market.

25.4.1 Policy, Strategy and Innovation

CINOP is an independent (inter)national research, project management and consultancy firm that is specialised in lifelong learning, vocational education & training (VET), adult education and employability. The holding organisation currently employs 150 professionals providing solutions to a wide range of clients in the 'golden triangle' government-education-labour market, national and international. CINOP is also part of the National Agency for Erasmus+. Further on there are some small organisations like Learn for Life, the Dutch platform for International Adult learning that participates in several EU-projects (inter alia I-Care, active ageing in a rural context) and organises the annual Adult Learning Festival. Denim is a consultancy agency on demographics and innovation, supporting organizations and businesses in the aging markets of the future. Active Age Group is an alliance of seven experts in housing, care and welfare, offering solid target group knowledge, years of experience with innovation and a large network of innovators. The Elephant Learning in Diversity is a small agency, partner in development of strategic policy and innovation, advising and recommending organisations how to make use of the European dimension of lifelong learning and social change.

25.4.2 Government, Funding and Grants

In the Netherlands, four Ministries are involved in policy for older people: Welfare, Health and Sport (health and care), Internal Affairs (liveability and community development), Social Affairs and Employment (sustainable employability), and Education, Culture and Science (adult education). The government has appointed three organisations for the organisation and execution of several grants: Agentschap (ESF), Agentschap LLL (Erasmus+), and ZonMW (national grants for health, care and prevention research). Further on there are several private funds. The largest ones are Oranjefonds (voluntary work), VSBfonds (intergenerational projects), Ouderenfonds (ageing and self-reliance).

25.4.3 Policy – Key Characteristics, Structure, Organization and Relevant Legislation

Adult education can be divided into two categories: formal and non-formal education. Formal adult education is obliged by the education ministry and offers a variety of training possibilities, such as secondary general adult education, Dutch as a second language, social functioning and empowerment. Most senior education however is non-formal, existing of a wide range of activities offered by different organisations. On a local level folk-high schools and socio-cultural work offer courses, on the national level one finds only private education and training providers and non-governmental organisations offering training to their members.

Lifelong learning has been prioritised over the last decades, and access to adult education for as many people as possible is often quoted as an important or high priority. Lifelong learning and adult education is linked to the idea of self-reliance and personal achievement, but also strongly connected to employability and vocational training to the point where adult education and vocational education are often difficult to separate. They both emphasise basic skills and qualifications for workers to secure their positions or enhance their work life, which is seen to reflect in the labour market and society as a whole. To this aim educational institutions are given a high level of autonomy, and are encouraged to put the needs of the student first, especially related to devising learning pathways to meet the needs of disadvantaged students.

Based on experiences from abroad like the English programme, *Stichting Lezen and Schrijven* ('Skills for Life') develops a suitable solution in decreasing literacy among many Dutch citizens. Embedded learning (combination of using digital and paper based learning materials) and blending learning (mix of online learning and face-to-face meetings) will be one of the important solutions in a new way to teach literacy among illiterate people.

Current adult education policies in the Netherlands can be characterised as a lack of governmental policy. At present, social partners seem to be the main promoters of the knowledge society, while the government seems to confine its responsibility mainly to young people, immigrants and welfare recipients, mainly decentralised to the municipalities.

In 2002, Dutch social partners issued an advice entitled 'The new way of learning', in which they advocate a strongly market-oriented – and indeed demand-driven – policy of adult education. 'Marketisation' of the Dutch adult education system will be a key thread in this country note: the visit has strongly illustrated the struggle with the transformation of a public service into a market, trying to take advantage of the 'pros' while avoiding the 'cons' of liberalisation. So did the government oblige immigrants to pay the costs of obliged 'citizenship courses' themselves. Another example: adult education is decentralised to the municipalities in

2015 with less financial support and they have to develop a regional plan, being free to contract different education suppliers.

25.5 Key Issues and Problems

To identify the level of knowledge and skills, the Netherlands takes part in the Programme for the International Assessment of Adult Competencies (PIAAC). Results indicate that the Netherlands has a very positive score compared to other participating countries, but there are larger differences between groups than elsewhere. For instance, men still perform in all skill areas better than women, especially the differences in math skills are big. The disadvantage of women compared to men is among the largest in all countries surveyed. Yet Dutch women perform good compared to women in other countries and they scored significantly higher on literacy and numeracy than the Organisation for Economic Co-operation and Development (OECD) average. Moreover, the Netherlands is also one of the countries where the differences in skills between younger and older generations are significant. It is also noteworthy that the Netherlands is finally one of the countries where the differences in language skills between natives and immigrants is the largest. The biggest disadvantage we find in first-generation non-western immigrants. Further on the differences in skills between natives and immigrants are larger in the group up to 35 years. This is particularly for the second generation non-western immigrants. Remarkable is also that the level of proficiency is relatively small determined by the level of education of the parents.

Knowledge of ageing skills is also important to core skills productively deploy as long as possible. Key skills show a parabolic pattern during the life cycle: first take to skills with age, then remain more or less stable until the 40th year of life, and then take off. Differences in skills between young and old are largest for problem-solving ability and smallest for numeracy. PIAAC examined in addition to the level of core skills also the use of skills on the job and shows particularly a positive relationship between the use and the level of skills among older workers (40–65 years). This is consistent with the ‘use it or lose it’ – hypothesis: the use of skills in older age contributes to the level of core skills. Frequently use of skills can influence ageing positively. Lifelong learning is an important tool for knowledge and skills continue to develop during life. The Netherlands is one of the countries where is a relatively widely participation in lifelong learning. However, PIAAC finds that participation in courses and training hardly related to the level of literacy and numeracy and problem solving skills. Same applies to non-formal learning in the workplace. Participation does not result in these activities to a higher level of core skills. This is however, only the relationship between general skills (literacy and numeracy, problem solving) and participation in lifelong learning. Training courses and training in the context of lifelong learning are often focused on other skills, such as vocational skills. But later life learning is also important. If we look at informal learning it is apparent that there is a link between learning and core skills.

25.6 Future of Later Life Learning

Most senior citizens make use of non-formal education in the Netherlands. This type of education is highly dependent on subsidies (mainly from local authorities) and is therefore threatened by the recent weak economy and possible budget cuts. It recent economic and political climate is not promising for senior education. Huge changes in the social infrastructure, encouraging longer participation on the job market and raising the retirement age are big political issues at the moment. Senior education on a local level barely compares to the total structure of non-formal adult education in the Netherlands. This total structure is suffering under the pressure of budget cuts and senior education most certainly will not be excluded from this development. It is expected the leisure education activities will be commercialised and no longer subsidised by local authorities. On a national level, and in general, senior education is increasingly seen in relation to the position of older employees on the labour market and programmes aimed at retraining, revitalisation and ICT-skills are now highly encouraged. However, due to the economic circumstances, employers are cautious when it comes to investing in human capital, especially that of older workers.

References

- CBS. (2014). *Sociaal-economische trends*. <http://www.cbs.nl/nl-NL/menu/home/default.htm>. Accessed 25 Jan 2015.
- Centraal Bureau voor Statistiek. (2015). *Publications*. <http://www.cbs.nl/en-GB/menu/publicaties/default.htm>. Accessed 25 Jan 2015.
- Cramer en Van der Kamp. (1989). *Leren op latere leeftijd*. Groningen: Rijksuniversiteit Groningen.
- Eurostat. (2015). *Publications*. <http://ec.europa.eu/eurostat/publications/recently-published>. Accessed 25 Jan 2015.
- Sociaal Cultureel Planbureau. (2015). *Publicaties 2011*. http://www.scp.nl/Publicaties/Alle_publicaties/Publicaties_2011. Accessed 25 Jan 2015.

Chapter 26

New Zealand

Brian Findsen

26.1 The Broad Social Context

Aotearoa/New Zealand, a colonized country in the South Pacific by the British, has a relatively small resident population of 4.3 million people but a land mass comparable to the UK. In its earliest European history it has been a major agricultural player as a breadbasket for Britain but more latterly has diversified its agriculture, industry and business to become a prominent market in the Asia-Pacific region. Its consciousness is much more embedded in this new reality. In the recent census (Statistics New Zealand 2013), the respective percentages of ethnic groups were as follows: European 74 %; Māori 14.9 %; Pacific Peoples 7.4 %; Asian 11.8 %; Middle Eastern, Latin American, African 1.2 % and other 1.7 %. These figures reveal an increasingly diverse ethnic composition with the main sector of increase among Asians (principally China and South Korea), reflecting significant inward migration. While in terms of age structure, the overall pattern is towards an ageing population (in 2013, people aged over 65 years constituted 14.3 %; 12.1 % in 2001), in the Māori and Pacific Peoples, a more youthful population is evident (Statistics New Zealand 2013).

New Zealand is officially a bi-cultural nation, emanating from the signing of the Treaty of Waitangi (1840) between the Crown and local *iwi* (tribes). The contract agreed to provide citizenship for Māori as *tangata-whenua* (people of the land) in exchange for *protection* (e.g. of language), *partnership* in common endeavours and full *participation* in society (as in education). Yet the statistics above reveal a case for consideration of the country as multi-cultural as well. The addition of Aotearoa to the country's name in this chapter signifies a commitment to a bi-cultural ethos

B. Findsen (✉)

Te Whiringa School of Educational Leadership & Policy, Faculty of Education,
University of Waikato, Hamilton, New Zealand

e-mail: bfindsen@waikato.ac.nz

and recognition of the special status of Māori. Yet, elsewhere, it has been noted that “the creative tension between bi-culturalism and multi-culturalism is played out in policy development in economic, social and cultural spheres, including education” (Findsen 2012: 231).

26.2 Older People in New Zealand

It is commonplace to ask the question “Who are older adults?” It is not commonplace to get a straightforward response. The notion of chronological age as a marker of “old age” is crude and largely ineffective (Phillipson 1998); other explanations have been equally devoid of merit. Given the major differences in ageing processes (e.g. biological, cognitive; social) amid individuals and varying interpretations of “ageing” across cultures, explanations have been more routinely embedded in legal definitions, and/or often linked to key transitions in people’s experiences of the lifecourse. Hence, older adulthood may be associated with “retirement” or the timing of a government’s distribution of pensions. In the New Zealand context, a government pension is available at age 65, irrespective of a person’s financial status (i.e. it is universal) and both genders are treated equally. This reflects a historically strong strand in New Zealand culture of equality of opportunity and of social justice. Nevertheless, age discrimination and elder abuse are still too prevalent in this society for any smugness to take root (Age Concern 2011/2012).

Given the economic reforms of governments over the last two decades and of the recent financial global melt-down, it is hardly surprising that the gaps between rich and poor have increased, the effects disproportionately experienced by seniors. The need for economic sufficiency for people over the age of 65 (the pension is seen, especially by the middle-class, to be inadequate of itself as a buffer against poverty) has pressurized larger numbers of older people to retain their work, even if part-time or casual, or seek new work roles in later life. According to the 2013 Census, in 2013 there were 22.1 % of those aged 65 years and over employed in the workforce (compared with 11.4 % in 2001). While advances in ICT are continuing to challenge older generations and changing their lives significantly, the realisation that the “new old” citizens will bring greater technological savvy into workplaces and homes provides some cause for optimism. Such societal change brings the need for lifelong learning in later life to a position of prominence, even if government is not an eager supporter.

26.3 Lifelong Learning

It is necessary to distinguish, as did Withnall (2010), between *learning* as a largely individualistic and fairly pervasive endeavour occurring in all sorts of contexts (including informal, non-formal and formal – see Jarvis 1985, for definitions) and

education which is usually systematic, structured and quite often credentialled. While this chapter includes discussion of structures of education in this country in which older adults participate, their more prevalent mode of learning is via non-formal (sometimes organizational) learning events such as being trained as a volunteer for a social agency or in informal settings of family or recreational activities (McGivney 1999). Lifelong learning has multiple purposes and is ubiquitous. The prevailing themes of lifelong learning identified in literature are the economic imperative; personal development, active citizenship and social inclusion (Findsen and Formosa 2011; Wain 2004).

It is argued that these four themes are prevalent in New Zealand society but older adults are differentially affected by them. In terms of economic robustness, many “young-older” people such as “baby boomers” enter later adulthood less financially prepared than they would like (commonly sandwiched between older parents moving in the direction of the fourth age and the needs of their own children and grandchildren). Māori and Pacific Peoples, more typically with larger families and with statistically shorter life expectancy (Statistics New Zealand 2013), often struggle financially and their formal learning opportunities in mainstream contexts are severely limited.

Personal development can emerge from formal, non-formal or formal learning. Pākehā have tended to seek out such opportunity unapologetically, as exemplified in the non-formal context of the University of the Third Age (U3A) movement. As Swindell (1999) has pointed out, the middle-class of predominantly European extraction have benefitted considerably from this participant-based educational agency organised on a self-help model, in which participants use the expertise within a community of practice (Wenger 1999). U3A is an exemplar of a liberal education programme, technically open to all older adults, but in practice confined to those in society with considerable social capital.

Opportunities for older adult learning from a perspective of promoting citizenship are again mainly observable in the non-formal arena. Older people in New Zealand tend to be keen volunteers in many social and leisure-oriented activities (see Golding 2012 for an extensive discussion of clubs and agencies which attract older people). Given the strength of a social justice ethic, older people are members of social movements (environmental; church-based; work-related) in which learning is prevalent on a daily basis in the form of popular education.

Social inclusion is a major strand in both formal learning (adult education) and less formal contexts. As Māori and Pacific Peoples are identified by the Tertiary Education Commission (TEC) (the integrating policy and funding body for tertiary education) as “priority groups”, many educational programmes are provided to help address social inequalities and exclusion. In the case study later in this chapter, an example of a tribally-based education programme for *kaumatua* (Māori elders) is discussed, as an exemplar of participatory education with and by Māori for Māori (Walker 1990).

26.4 (Older) Adult Education

The field of adult education in New Zealand shares many of the characteristics with Britain but also has its own distinctive character, reflecting the location of the country “down under”. As explained by Findsen (2005: 84), the provision of adult education for older people is undertaken by diverse organizations – those where the learning is controlled by older people themselves (e.g. U3A); programmes developed explicitly for older adults (e.g. travel and learn); mainstream provision in which topics appeal to older adults (e.g. adult and community education in high schools); those agencies which ignore the learning needs of seniors. Significantly, too, these organizations may not have education/training as their primary purpose. In such instances, education may be the vehicle to achieve other-related goals of social service or caring for elders. Some of these agencies work *within* the education sector (e.g. Rural Education Activities Programmes, REAPs); others *outside* the sector (e.g. Age Concern). Hence, some education is provided *with* and *by* older adults; some is provided *for* older adults.

According to Dakin (1992), adult education structures and processes in New Zealand can be classified according to *derivative* and *indigenous* types. The derivative type depends on “borrowing” from overseas models and transplanting them, with some modification, to the local scene. Hence, early adult education in this country reflected the values and ethos of the prevailing ruling class, with colonization as its primary mechanism. Adult education agencies tended to serve the needs of Pākehā. Significant numbers of older people, especially women, have been loyal servants of middle-class provision, exemplified by centres for continuing education in universities. Unfortunately, the National-led Government dismantled adult education provision in the eight universities of New Zealand, cutting all funding to universities for adult and community education in 2011. Prior to that, the same Government had reduced funding to community education in schools in 2010 by 80 %. Historically, both of these avenues have been well patronized by older adults, especially women.

In Dakin’s analysis, there is little discussion about *indigenous* ventures (those idiosyncratic to New Zealand culture) though he acknowledges the importance of this area. Much has occurred in Māori education in recent decades. *Tino rangtiratanga* (self-determination) among iwi has been a powerful driver of social and educational policy in this country, associated with the principles emanating from the Treaty of Waitangi. Traditional knowledge and learning among Māori has emphasized lifelong and lifewide learning as fundamental concepts in their tribal systems, long before the advent of Pākehā imperialism (Bishop and Glynn 2003). In the formal context of the *marae* (communal facility to include a *wharehau* – meeting house – and supportive amenities), men assumed key roles in the public sphere while women occupied the spaces of the private and undertook hospitality (Metge 1984).

In the early 1980s, at a time when neo-liberalism was taking hold in the economic and political realms, Māori people recognized danger signals in terms of the

decline in the use of *te reo* (Māori language) and re-asserted their sovereignty via the establishment of initially, *kohanga reo* (language nests) and more latterly, other educational institutions throughout the lifecourse. In *kohanga reo*, *kaumatua* (seniors) served as socialisers of children in this pre-school environment. In compulsory education, over the 1990–2010 decades, *kura kaupapa Māori* (Māori-centred schools) were established followed by three *whare wānanga* (tertiary education providers), with the intent of focussing on the interests and development of respective *iwi*. In effect, Māori established a formal education programme to which Māori students of all ages could engage. According to the TEC, these *wānanga* have attracted many mature aged students, some of whom would be classified as older adults (Ministry of Education 2007).

26.5 Tertiary Education in New Zealand

The tertiary education system is unique internationally as it tends to be inclusive of a multitude of formal (and some non-formal) education providers within post-compulsory education. These organizations are incorporated in the ambit of the TEC whose function is to fund and monitor these organizations' performance and to advise on tertiary education priorities and policies (TEC 2010: 11). Incorporated within the Tertiary Education sector is literacy and numeracy education (as part of Foundation Studies), part-time and full-time study, work-related training and doctoral studies. Many mature-age students (defined as 25+ years by the TEC) have studied part-time in New Zealand universities, especially when “open entry” to universities and polytechnics was available.

Within the “mature student” category there is a subset of over 40s, known as “older students”. According to the Ministry of Education (MoE), over 30 % of all tertiary students are “older students” (MoE 2006: 1). Nearly 8 % of all New Zealanders over 40 are enrolled in tertiary education and are most likely to be enrolled in sub-degree certificates and diplomas. Participation trends observed by Scott (2010) include:

- Nearly half (48 %) of New Zealanders aged 25–64 were in some form of study in 2006.
- Women were slightly more likely to participate in non-formal study than men
- Participation decreased with age for formal study but peaked in the 45–54 age group for non-formal study
- Employed adults were less likely to participate in formal study than non-employed adults
- 77 % of those who did non-formal study in 2006, did so for job reasons (Scott 2010: 1).

These observations are consistent with international studies on participation patterns of older people (e.g. Thomas 2001; Tuckett and McAulay 2005; Oduaran and Bhola 2006). The trend of more older people undertaking education/training for

vocational reasons (e.g. holding on to a job in the face of increasing pressure from younger, more-qualified candidates; preparing for a new or encore career) belies the myth that older adults are principally motivated by the intrinsic value of education. These patterns are partially predictive of what to expect from the “young-old” in this country in the immediate future.

Some post 60 years old students have engaged in formal education but as neither the TEC nor Ministry of Education bothers to gather statistics for such older students, it is intelligent guesswork to observe that this group would be small, primarily in non-vocational education. In the wider tertiary education scene there are many providers where older adults have access: eight universities; 20 institutes of technology or polytechnics; several hundred private training establishments (e.g. language schools; business, hospitality and tourism), 38 industry training organizations (e.g. automotive; dairy); three wānanga (principally located in the North Island); schools supporting ACE, foundation studies, youth training, workplace literacy and other providers such Literacy Aotearoa, the NZ Playcentre Federation and ESOL Home Tutor Schemes. As these are included under the umbrella of the TEC, they receive public money.

Politically, adult education has had to fight to retain its status as a credible alternative to formal education. Historically, it has typically been fragmented, lacked a collective vision, exercised poor leadership (Benseman et al. 1996) and it has been beneath governmental radar until the decision was made to incorporate adult and community education within the TEC in the new millennium. Ostensibly, this move legitimized the field and assured it of funding, albeit a pittance in comparison with schooling. The primary focus of government has been on adult literacy and numeracy after international surveys exploded the myth that New Zealand was a completely functional literate nation. The identified official “priorities” of government for ACE are:

- Targeting learners whose initial learning was not successful
- Raising foundation standards
- Strengthening social cohesion.

The priority areas are:

- Literacy, numeracy
- English language, including ESOL
- New Zealand Sign language
- Te reo Māori.

The “target learner groups” are: those whose initial learning was not successful; Māori; Pasifika; migrants and refugees (TEC 2013). The intention is to “raise up” the sections of the population who are currently under-achieving in education; in short, to provide for social inclusion in lifelong learning terms. In this scenario, the visibility of older adult education, in the formal system, is just beyond zero. There is limited scope for funding for older people associated with literacy and numeracy (perhaps senior family members migrating to this country to join established younger family), te reo (encouraging kaumatua to become fluent in the Māori

language to pass on to younger generations) and remedial education (perhaps upgrading ICT capabilities).

26.6 Policy Dimensions

Policy concerning the lives of older people operates at multiple levels (international; governmental; institutional) and from diverse perspectives (learning/education; health; financial status; social welfare; housing, the labour market) for which there are governmental portfolios and quangos (Boston and Davey 2006). For this chapter, the policies concerning lifelong learning and ageing appear most relevant.

Lifelong learning policy has been to the fore while adult education policy has diminished (Findsen and Formosa 2011). New Zealand is signatory to all major international initiatives in adult education/lifelong learning via the United Nations Education, Scientific & Cultural Organization (UNESCO), the Organization for Economic & Cultural Development (OECD) and the International Labour Organization (ILO). It is a positive adherent of discourse on lifelong learning, especially that advocating democratization, as revealed in the Faure report (1972) and many subsequent reports (such as *Koia! Koia!* delivered by a working party on the role of adult education and community learning, 2001, and a national report on the field, MoE 2008). Earlier, the Ageing and Education Working Party (1987) was a major effort by the field of adult education (supported by the then National Council of Adult Education, since disestablished) and recommended progressive moves to highlight the character of later life issues, requiring educational responses, specifying older people as a major area of focus for the future. More recently, the phrase lifelong learning is now embedded in the TEC vocabulary but this does not necessarily translate into financial support for older learners.

The Government has tended to grapple with ageing policy more tangibly than that of lifelong learning. As reported by Tobias (2006), the Labour/Alliance Government of 1999 set up a Positive Ageing Strategy, a component of a wider approach to social development. The new policy was led by the Office for Senior Citizens housed in the Ministry of Social Development (Department of Social Welfare 1999). A statement from the current Office for Senior Citizens is significant:

The New Zealand Positive Ageing Strategy reinforces Government's commitment to promote the value and participation of older people in communities. Older people are important members of society and have the right to be afforded dignity in their senior years. They have skills, knowledge and experience to contribute to society... (p. 2)

Explicit links to learning are made in this document – “the ability to age positively is assisted by good investment in education throughout life” (p. 3). With respect to choice of work later in life, the policy states that “more emphasis must be given to life-long learning for workers of all ages, so that they maintain and increase their skills and productivity as they grow older” (p. 4). The Office for Senior Citizens

espoused 10 Positive Ageing Goals and Objectives (as at May 2008) aligned to income, health, housing, transport, ageing in the community, cultural diversity, rural, attitudes, employment and opportunities. Several of these domains have direct reference for the need for on-going learning/education for seniors. Hence, overall, the attention given to ageing by government is high and the commentaries related to lifelong learning in this respect are supportive. However, there is a sizeable gap between espoused goals and improvement of quality of life for seniors on the ground.

26.7 Workplace Learning and Older Adults

One of the most under-rated areas for older people's learning is in relation to the labour market and work (both unpaid and paid). Learning in later life is linked to work, regardless of its location and purposes.

Previously, one of the themes of lifelong learning for all adults was identified as the economic imperative. This is no different for older people whose financial sufficiency is both a personal and social concern. Much depends on the specific conditions under which older adults work – whether full-time or part-time; casual or seasonal – and their respective scope for either worker education at a formalized level or more informal learning, such as via mentoring relationships in the workplace. Given that some of New Zealand society is ageist (Koopman-Boyden 1993), employers and employees alike can unwittingly (hopefully, not intentionally) imbibe stereotypical ageist assumptions – such as *Older workers are not as productive as younger workers; older workers are less flexible and adaptable* – which can work against older people's rights to learn (Rothwell et al. 2008).

In an analysis of the New Zealand labour market, Davey (2006) remarks that while in 2006 almost 40 % of the labour force (deemed to be people aged from 15 to 64) are aged 45 and over, by 2018 this will be 44 %. Importantly, the number of people aged 65+ will grow significantly and many erroneous assumptions about older people's capabilities to work and learn will need to be thrown out the window. The country needs to maximise the potential of older workers (Davey and Cornwall 2003); given the removal of compulsory retirement in New Zealand, there is scope for a "win-win" scenario for older workers and the state of the nation's economy. Further learning, both formal and informal, will continue as more employers recognise the benefits of retraining/educating *all* staff.

26.8 Self-Directed Learning

One of the lesser recognized areas of older adult learning, especially in terms of its quantity and quality, is that which is self-directed (SDL). While this concept has multiple possible meanings (see Tight 1996), the idea of adult learning projects

(Tough 1971), those informal learning activities of a self-planned nature which constitute a significant learning effort, is very pertinent to older people's learning, much of which is informal (McGivney 1999). This is certainly the case in New Zealand and its character is likely to be less hindered by social stratification. Regardless of gender, social class, ethnicity or geographical location, seniors continue to learn independently and/or in social settings. By its very nature, SDL is not documented but, as revealed by Golding's (2012) studies with regard to men, the scope is potentially enormous and more often in non-educational sites.

Volunteering is another arena where older adults prevail and their learning is commensurate with their level of engagement. Given that this is a voluntary choice, older volunteers participate in self-directed learning associated with communities of practice, usually in a social service capacity. Older workers can be observed in organizations such as Greenpeace, mentors in schools, servers in charities, as docents in museums and guides in tourism sites. In association with this work, they learn through appropriate training and experiences how to contribute to their own self-worth and the effectiveness of organizations (Jarvis 2001).

26.9 An Exemplar of Older Adult Education: The Rauawaawa Trust

The PricewaterhouseCoopers review of adult and community education in New Zealand acknowledges the relatively high proportion of older adults (over 65) who participate in this sector. In addition to considerable social benefits of participation, there are indirect consequences in terms of personal mental and physical wellbeing (2008: 26). The Rauawaawa Trust is one of five special programmes for ACE discussed in this report and perceived to be nationally significant.

The relationship between the University of Waikato (in particular, its Centre for Continuing Education, CCE) and the Trust has been pivotal to the integrity and sustainability of the programme of older adult learning for *kaumatua* by *kaumatua*. The Trust is a multi-faceted, holistic entity established for the strengthening of quality of life for seniors in the *Tainui iwi*. Historically, the programme was co-constructed by the Trust and the University. Leadership for the programme was devolved to the CCE which has had longstanding connections with Māori education and local communities. Finance for the programme came via an adult and community education allocation of the TEC until recently when the government ceased funding to universities for Adult and Community Education (ACE). The Trust and University negotiated a memorandum of agreement to identify the conditions under which the programme was conducted. From the perspective of the University, the programme needed to fulfil the criteria (supplied by the TEC) for University involvement, appropriate for a university; from the Trust's perspective, it was imperative to uphold learning principles of *kaupapa Māori* (very similar to Freirean concepts of education), to exercise culturally preferred pedagogy.

The remit for the Trust was and still is to enhance the cultural identity of the people, in this case, of seniors. The programme is unique in its concentration upon kaumatua, in a world where youth typically take precedence. It entails peer learning where the expertise for conducting learning comes from within the larger group (akin the U3A in the Pākehā world). Its mission statement is “to enhance the quality of life and wellbeing of kaumatua by providing health, social, educational and financial services”. In accord with this intention, kaumatua actively participate in varied learning activities in *rorohiko* (computer literacy), *he oranga kai* (healthy eating), *te reo* (Māori language), *taonga* (caring for cultural items); *waiata/whaikorero* (action songs and speeches); *korowai* (cloak-making) and *harakeke* (flax-making for baskets).

26.10 Concluding Remarks

While the field of older adult education is hardly recognized as a separate entity in Aotearoa/New Zealand, there is certainly considerable learning occurring for older adults, especially in non-formal and informal arenas. In terms of structured educational opportunities, there is virtually no integration, funding is scant and government is hardly interested. Accordingly, it is no surprise that a professional orientation to this sub-field is not established. Further, funding cuts to adult and community education (in high schools’ community education and in universities) have thrown more responsibility onto individuals and groups of seniors to organise their own learning events. This self-help tradition is quite strong, particularly amid the middle-classes and is more frequently associated with women. Yet to dismiss learning for older men would be a mistake – it is more a matter of investigating less obvious avenues for learning consistent with a masculinist culture.

New Zealand society is fast-changing from its historical European roots to become a diverse and ageing population with a multi-ethnic base. The creative tension between bi-culturalism and multi-culturalism, arguably, will persist and many more varied and innovative forms of learning/education among older people should be expected. In Dakin’s terms, there will be more indigenous forms and fewer derivatives.

References

- Adult Education and Community Learning Working Party. (2001). *Koia! Koia! Towards a learning society: The role of adult and community education*. The report of the adult education and community learning working party. Wellington: Ministry of Education.
- Age Concern New Zealand. (2011/2012). *Annual report – 1 July 2011 to 30 June 2012*. www.ageconcern.org.nz/acnz/publications. Accessed 22 Jan 2014.
- Ageing and Education Working Party. (1987). *Ageing and lifelong learning in New Zealand*. Wellington: National Council of Adult Education.

- Benseman, J., Findsen, B., & Scott, M. (Eds.). (1996). *The fourth sector: Adult and community education in Aotearoa New Zealand*. Palmerston North: The Dunmore Press.
- Bishop, R., & Glynn, T. (2003). *Culture counts: Changing power relations in education*. London: Zed Books.
- Boston, J., & Davey, J. A. (Eds.). (2006). *Implications of population ageing: Opportunities and risks*. Wellington: Institute of Policy Studies, Victoria University of Wellington.
- Dakin, J. (1992). Derivative and innovative forms of adult education in Aotearoa New Zealand. *New Zealand Journal of Adult Learning*, 20(2), 29–49.
- Davey, J. A. (2006). The labour market. In J. Boston & J. A. Davey (Eds.), *Implications of population ageing: Opportunities and risks* (pp. 189–220). Wellington: Institute of Policy Studies, Victoria University of Wellington.
- Davey, J. A., & Cornwall, J. (2003). *Maximising the potential of older workers*. Wellington: New Zealand Institute for Research on Ageing, Victoria University of Wellington.
- Department of Social Welfare. (1999). *From welfare to well-being and strengthening families*. Wellington: Ministry of Social Policy.
- Faure, E., Herrera, F., Kaddowa, A., Lopes, H., Petrovsky, A., Rahnama, M., et al. (1972). *Learning to be: The world of education today and tomorrow*. Paris: UNESCO.
- Findsen, B. (2005). *Learning later*. Malabar: Krieger.
- Findsen, B. (2012). University and community engagement through continuing education: The case of the University of Waikato and the Rauawaawa Trust. In P. Jones, J. Storan, A. Hudson, & J. Braham (Eds.), *Lifelong learning and community development* (pp. 43–55). London: Forum for Access and Continuing Education and the University of East London.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Rotterdam: Sense Publishers.
- Golding, B. (2012). Men's sheds, community learning and public policy. In M. Bowl, R. Tobias, J. Leahy, G. Ferguson, & J. Gage (Eds.), *Gender, masculinities and lifelong learning* (pp. 122–133). Abingdon: Routledge.
- Jarvis, P. (1985). *Sociological perspectives on lifelong education and lifelong learning*. Athens: Department of Adult Education, University of Georgia.
- Jarvis, P. (2001). *Learning in later life: An introduction for educators and carers*. London: Kogan Page.
- Koopman-Boyden, P. G. (Ed.). (1993). *New Zealand's ageing society: The implications*. Wellington: Daphne Brasell Associates Press.
- McGivney, V. (1999). *Informal learning in the community*. Leicester: NIACE.
- Metge, J. (1984). *Learning and teaching: He tikanga Māori*. Wellington: Māori and Island Division, Department of Education.
- Ministry of Education. (2006). *Older students*. Wellington: Ministry of Education.
- Ministry of Education. (2007). *Māori participation in tertiary education 2005*. Wellington: Ministry of Education.
- Ministry of Education. (2008). *The development and state of the art of adult learning and education: National report of New Zealand*. Wellington: Ministry of Education.
- Oduaran, A., & Bhola, H. (Eds.). (2006). *Widening access to education as social justice*. Dordrecht: Springer.
- Phillipson, C. (1998). *Reconstructing old age: New agendas in social theory and practice*. London: Sage Publications Inc.
- PriceWaterhouseCoopers. (2008). *Adult and community education: Economic evaluation of adult and community education outcomes*. August, PWC.
- Rothwell, W. J., Sterns, H. L., Spokus, D., & Reaser, J. M. (2008). *Working longer: New strategies for managing, training and retaining older employees*. New York: American Management Association.
- Scott, D. (2010). *Non-formal and formal learning – Adults in education*. Wellington: Ministry of Education.

- Statistics New Zealand. (2013). *2013 census QuickStats: About national highlights*. Available from www.stats.govt.nz
- Swindell, R. (1999). New directions, opportunities and challenges for New Zealand U3As. *New Zealand Journal of Adult Learning*, 27(1), 41–57.
- TEC Tertiary Education Commission. (2010). *Tertiary education report: Introduction to the key issues in tertiary education*. Available through <http://www.tec.govt.nz>
- TEC Tertiary Education Commission. (2013). *Adult and community education*. Available through <http://www.tec.govt.nz>. Accessed 23 Jan 2014.
- Thomas, L. (2001). *Widening participation in post-compulsory education*. London: Continuum.
- Tight, M. (1996). *Adult education and training: Key concepts*. London: Routledge.
- Tobias, R. (2006). Educating older adults: Discourses, ideologies and policies 1999–2005. *New Zealand Journal of Adult Learning*, 34(1), 2–28.
- Tough, A. (1971). *The adults' learning projects: A fresh approach to theory and practice in adult learning*. Toronto: Ontario Institute for Studies in Education.
- Tuckett, A., & McAulay, A. (Eds.). (2005). *Demography and older learners*. Leicester: NIACE.
- Wain, K. (2004). *The learning society in a postmodern world: The education crises*. New York: Peter Lang Publishing.
- Walker, R. (1990). *Ka whawhai tonu matou: Struggle without end*. Auckland: Penguin.
- Wenger, E. (1999). *Communities of practice: Learning, meaning and identity*. Cambridge: Cambridge University Press.
- Withnall, A. (2010). *Improving learning in later*. London: Routledge.

Chapter 27

Nigeria

Michael Omolewa

Nigeria is the most populous country in Africa, its population being estimated at 160 million. It is made up of 36 States and a Federal Capital Territory, and runs a presidential system of government. It is a member of the Commonwealth, sharing historical ties with colonies formerly associated with Britain. There is a rich diversity of languages, cultures, religions, and ethnic groups in the country. It is made up of over 400 different ethnic groups with distinct traditional practices, orientations and religions (including Christianity, Islam and traditional religion).

27.1 The Foundations

Long before Africa met the Arab Muslim missionaries from about the eleventh century AD, Western explorers, and missionaries from the fifteenth century AD, education was a pre-occupation of the indigenous peoples of Nigeria. Under this setting, educational provision was inclusive and non-discriminatory. This arrangement ensured that the education of the older adult population was mandatory for all educational providers (Omolewa 1981; Aderinoye 1997; Omolewa et al. 1998; Adekanmbi 2000; Avoseh 2001).

Accounts of the traditional/indigenous system are constantly exaggerated as its adequacy and flawlessness are painted, sometimes with embarrassing and grossly misleading distortion. Or how else can one explain how such a glorious past faded almost without recognition and unregretted. How did the powerfully rooted system capitulate?

M. Omolewa (✉)
University of Ibadan, Ibadan, Nigeria
e-mail: michaelomolewa@yahoo.co.uk

Of course, the harrows and horrors of the invasion from the outside are important factors as they ushered in the nefarious trade in human cargo from African soil to the Arab countries in the North and across the Atlantic Ocean to the Americas and the Caribbean countries. However, some general trends can still be identified in the areas of religion and religious belief systems; the apprenticeship system and preparation of the future generation training; the status of trade, of women and their empowerment and preparation for contribution to the home and the wider society; of community service and commitment, and of politics.

Central to all these programmes were the concepts of inclusion and lifelong learning. It is of course true that the concept of education for all from the womb to the tomb, the cradle to the grave and from birth to death was by no means a monopoly of the Nigerian. Nor is the idea of life after death unique as shown by the tradition of the Egyptians and the building of pyramids by them.

The work of leading accomplished Nigerian scholars (such as Idowu 1962; Ade Ajayi 1965; Obidi 1995; Peel 1968) on the culture and tradition of the Nigerian people demonstrates the resilience of the populace, the diversity of practices and people's innovation. Indigenous education in Nigeria had a clear focus on the preparation of the entire community for livelihood. This meant that the education of the older adult was also a priority. The constituents of the training included skill acquisition, learning new methods of doing things, learning to be self-reliant, to be responsible in whatever position one was posted, to learn to trust others and to live together.

Perhaps the most striking nature of indigenous education was the length of the learning process which was lifelong. Education did not just begin from the womb to the tomb; it began before the womb and continued after the tomb. Indigenous education thus had an active component of continuing education in which the learner was constantly challenged throughout life to learn new tricks, to identify better ways of doing what was being done and never to rest until the best was accomplished. The search for that best practice continued until death. The status of the dead is significant among the Nigerian people. At death, the Yoruba of the South West of Nigeria often encourage the dead not to cease learning. In the saying, "ma jokun, majekolo, ohun ti won ban je lorunniki o je" (translated into English: 'do not eat worms, do not eat millipedes, whatever is eaten in heaven should be what you should join them to eat'), the dead are invited to begin the process of learning how the people live after life so that they can become integrated and live comfortably with those who had preceded them.

The impression is often given that the concept of learner participation was new to Nigerians. But again this is an erroneous belief. The apprenticeship and the age grade system ensured that participants were both actors and learners. The desire to be relevant, to be efficient and capable and fit into the social and political arrangement of the society made continuing learning mandatory. The older adult needed also to cope with the changing challenges of the period. Religion, law and order, legal reforms, societal sanctions, rituals and sacrifices, war and peace, arms and armaments and of military strategy and performance: these were persistent issues which also required constant attention and consideration.

Lifelong learning in traditional African societies had relied largely on informal and non-formal structures and systems through various learning modes based around cultures, traditions, religions, languages, values, beliefs, customs, ideas, folkways, mores, laws, taboos, stories, riddles, legends, myths, and proverbs to mention just a few (Fasokun 2000). Other learning domains include traditional African science, technology, and music. In African traditional societies, for instance, music is used to transmit messages, ideas and emotion. It is used for maintaining law and order and for conveying history. The content, lyrics, form, mood, style are very useful in transmitting information from one generation to another (Fasokun 2000).

27.2 Educational Policy

Opposition to the adoption of the principle of providing education for the older adult population has remained in Nigeria since colonial times. For governments had to be selective in educational provision, and therefore excluded segments or groups that were not considered a priority. For example, when in 1946 Major A.J. Carpenter, Nigeria's Mass Education Officer, proposed a mass literacy programme that would be inclusive of all segments of the Nigerian population, his colleagues protested and mocked strategies to link mass literacy with politics. Thus J.G. Speer, the Colonial Education Officer, was most critical and noted:

It is not in the best interest of Nigeria to attempt to stimulate unwilling adults to attend literacy classes at a time when neither Government nor the Voluntary Agencies have adequate resources, in money, material or staff, to provide satisfactory schooling for all the children who want to learn (National Archives, Ibadan 1949, MED (FED) ¼ CDE 465).

The proposal was not adopted. On the attainment of independence by Nigeria, the more radical regional governments proposed an inclusive education package for the peoples. To this end, Chief Obafemi Awolowo, the first Premier of Western Nigeria and a pioneer in educational reforms in the country at Independence, submitted that:

...to educate the children and enlighten the illiterate adults is to lay a solid foundation not only for future social and economic progress but also for political stability (Awolowo 1960, p. 68).

In a similar vein, the first Minister of Education of Western Nigeria, Chief Stephen Oluwole Awokoya, who introduced the first Free Primary Education in independent Nigeria, also once observed that development could not take place if literacy is denied the adult. As he put it:

...they are the people who participate in voting for a government, producing the food, building the houses, curing the sick, cleaning the environment, making the clothes, transporting goods and personnel, producing electrical energy, distributing and selling goods, operating and using the financial institutions, administering the government, adjudicating in the courts, and preserving the territorial integrity of the nation (Awokoya 1982).

There was no uniformity in the pace of change and progress. For example, in Northern Nigeria, there was a vigorous, well-coordinated literacy and post literacy campaign which was an integrated approach to community development called *Gaskiya ta fi kwabo* (Truth is more than a penny). In Western Nigeria the Action Group sought to limit the neglect of the politically weak. Thus, the deeply entrenched social prejudice against the poor, marginalized and voiceless were visited only periodically at election and campaign seasons. Under the new regional Minister of Education, Stephen Awokoya, a passionate case was made for the continued relevance of the older adult. A magazine, entitled *Aworerin* which carried fascinating stories of interest to older adults, was introduced by Awokoya's Ministry of Education.

The Government of Nigeria was also to proclaim, on the attainment of political independence, that:

...in order to eliminate mass illiteracy within the shortest possible time, an intensive nationwide mass literacy campaign will be launched as a matter of priority and as a new all-out effort on adult literacy programmes throughout the country. The mass literacy campaign will be planned with a limited duration of ten years during which all available resources will be mobilized towards the achievement of the total eradication of illiteracy (Federal Government of Nigeria 1977).

The 'each one, teach one' method, in which everyone would have the social responsibility of supporting literacy programmes, was introduced by the Fafunwaled Ministry of Education. A special conference was convened by the foundation Executive Secretary of the Nigerian Mass Education Commission (NMEC) in Kaduna to explore the feasibility of the proposal and work out modalities of its adoption and practice.

Opposition to the vision and the programmes for the education of the older adult came, strangely, from members of parliament who were normally expected to protect the interest of their electorate, the majority of whom were amid the adult population. Speaking on the Education Budget in the Eastern House of Assembly in March 1954, one of the members of the legislature declared:

We have in the estimates here, 3430 pounds to be spent on Adult Education Officers – I have not been able to see the usefulness of spending such on adult education ...Some of these people we want to educate are already so old that they will not be of any use ... I think that instead of spending 3430 pounds on Adult Education Officers such money could be used to develop elementary education in backward areas, so that after some years the problem of adult education will disappear because children are educated right from childhood, the problem of illiteracy will disappear in thirty to fifty years. This would be better than spending money to educate adults who are so old already that they will not benefit by the type of education given to them under the Adult Education (Omolewa 2008, p. 702).

In Eastern Nigeria the regional Government was firmly opposed to an active promotion of adult education. For example, it took no part in initiatives to establish literacy centres for women, and stated in the spirit of the voluntary adult education movement of Britain that 'classes for women are started only at the request and desire of the women themselves' (Omolewa 2008, p. 702) Furthermore, adult education organizers were not on the permanent staff of the Education Department but

were temporary employees. Thus, the Eastern Region Minister of Education informed the House of Assembly in 1955 that there were no adult education officers in each province 'because priority of funds and staff must be given to primary education' (Omolewa 2008, p. 702).

27.3 The International Context

Nigeria has been part of the United Nations Educational, Scientific and Cultural Organisation (UNESCO) family since 1960 and has responded to the initiatives of the organization in promoting inclusive education which encouraged member nations to incorporate the education of older adults in the education policy and programmes. Faure's Report, *Learning to Be*, published by UNESCO in 1972, was aimed at encouraging Member States of UNESCO to take the provision of non-formal education to meet the educational needs and challenges of the emerging fast track information societies of the new millennium. The new technology, ICT, became expedient for the preparation of human resources for the nation and the engagement of "early leavers" derogatorily labelled as "drop outs" or "withdrawers". The Open University system and distance learning were introduced to take care of a large pool of learners, many of whom were older adults interested in more leisurely, and continuing learning. Correspondence education eventually became translated into distance education and major providers began to attract clientele from the teaching profession, civil service, the armed forces, and police. The concept of lifelong education was also to be replaced with lifelong learning (Oduaran 2000). Over the years, it can be observed that lifelong learning has become more popular because, among other reasons, it has focussed responsibility for learning on individuals, thus taking pressure off governments to provide education. Lifelong learning has also introduced greater flexibility to the learning approaches by adults who can decide on the content and time considered most appropriate, suitable and convenient for learning.

Following international pressures and the introduction of international programmes and conferences, Nigeria had responded with a variety of initiatives including a National Commission for Mass Literacy, Adult and Non-Formal Education, a similar Commission for Nomadic Education, an approved national curriculum for women's education and an advocacy campaign including enrolment drives, mass literacy campaigns, public enlightenment efforts, and lobbying among policy makers. In 1993 a National Conference on Education for All (EFA) was held in Nigeria towards achievement of the goals established by the 1990 EFA conference in Jomtien. However, while laudable efforts were made towards meeting EFA goals, the concentration of efforts was more on a formal interpretation of the nature of the illiteracy problem. This view has been shared by Rosa Maria Torres who has observed that of the 16 major identified thrusts of the EFA, only two or three speak directly to the issue of adult literacy component of Adult Basic Education (Torres 2002).

27.4 Nigerian Responses

In more recent years in Nigeria international attempts have been made to improve the situation. Sarumi (2001) has listed some of the organizations which have made a contribution in the formation of ideas and project support to initiatives in the education of older adults in Nigeria. Among these are the United Nations and its specialized agencies, especially UNESCO and the United Nations Children's Fund (UNICEF); development assistance agencies such as the British Council and the Department for International Development (DFID); and Non-Governmental Organizations (NGOs) such as the United States based Laubach Literacy International and the International Foundation for Education and Self Help (IFESH); and, the German Adult Education Association (DVV). In situations where funding of literacy has not been a priority in government budgets and where wealthy Africans have been reluctant to make a contribution to the empowerment of the people through literacy efforts, the contribution of international agencies and organizations has provided the much needed resources and incentives for effective literacy works, especially for more vulnerable groups in rural areas and among the poorer population in urban areas.

27.5 The University Village: An Experiment

The Department of Adult Education at the University of Ibadan, Nigeria, conducted an experiment on how best to motivate learning among the older adult population. The University Village Association (UNIVA), founded in 1989 at the University, the oldest Department of Adult Education in Africa, was established as an organisation involving academics from the University of Ibadan, working in partnership with rural populations to make a contribution to the search for a solution to the problem of access to education for the non-literate population of Africa (UNESCO 1962, 1976, 1991, 1997; Haidara 1990). UNIVA, in the process, began to explore how an alternative method of educational delivery could counter the much vilified formal educational system. The idea was to ensure that learning became attractive, pleasurable, enjoyable and thus sustainable, productive and results-oriented.

UNIVA conducted its experiment from 1989 to 1999 and focussed attention on the bulk of the population who were excluded from Western education and who aspired to benefit from the new educational provision. The population was mostly composed of vulnerable groups, mainly older adults, in communities.

The experiment observed how the failure of literacy providers to engage with tradition led to subsequent sustained cultural and political resistance. It also reviewed the more sensitive and considerate policies of emerging political leaders, and drew attention to the efforts of the more liberal post-independent administrations to promote the right to self-determination for indigenous peoples. The experiment was also carried out within the wider context of citizenship training and

lifelong education, and traced the relationship between learning and citizenship (Omolewa et al. 1998; Avoseh 2001).

For the UNIVA experiment, learning was designed as lifelong and to accommodate a flexible curriculum. The experiment also had the goal of providing learners with the basic reading and writing skills required for the growth of self-confidence and self-esteem (Bhola 1984, 1990). It was argued that when people are able to express themselves freely and make meaningful and critical judgement of their leaders, and at the same time are able to exploit the resources (both natural and human) at their disposal in a sustainable way, this is development in practice (Kolawole 2011).

After the initial identification of the learning needs of the people, UNIVA embarked on the mission to mobilise the adult neo-literates to enrol and participate in the literacy programme (Knowles 1972). There was the predicted initial resistance from participants which gradually fizzled out. The strategies used to mobilize these adult illiterate men and women were varied. First, there was the involvement of the village heads (*baale*) and chiefs, as well as influential individuals in each of the villages. The literacy team met each of these people at various times to discuss with them the purpose, significance, and benefits of literacy education. This was followed by the formation of a village literacy committee with the co-operation of the *baale*, chiefs and contact persons in each village. There was also the use of handbills, posters and pictures, which were widely distributed throughout the villages.

The UNIVA experiment has unequivocally demonstrated the value of building Western Education into the indigenous educational system, making learning a pleasure to the population. The experiment has also successfully demonstrated that increased access to learning will often bring about social justice and open doors of opportunities to a vast, ignored and neglected populace.

Equally importantly, the experiment has potential applicability to societies in the wider global community, especially the indigenous peoples of plural societies around the world, such as the “First Nations” of Canada, the Aborigines of Australia, the indigenous peoples of Latin America and Southern Africa, and the Maori of New Zealand. These people are usually vulnerable and protective of their tradition and cultural heritage, including their languages. It is also clear that these indigenous peoples can benefit from the literacy initiative which constitutes part of the Millennium Development Goals (MDGs) that had inspired the United Nations Literacy Decade, 2003–2012, and the global literacy challenge. Furthermore, it will be endangering social and economic stability to ignore the millions of the adult population who are denied basic literacy and numeracy skills while being expected to participate fully in society.

It is significant that, as pointed out earlier, the value of the experiment has been recognised by UNESCO, a specialised organisation of the United Nations which has been given the mandate for the promotion of education and the protection of the global cultural heritage. UNESCO has always encouraged dialogue among conflicting and diverse interest groups, people who do not share common views or common beliefs, coming from all the regions of the world with different civilisations, cultures

and religions. UNESCO is constantly aware of the global application of some best practices from other parts of the world and it is within the context of the mission of UNESCO that the experiment reported in this chapter had sought to establish the link between access to learning and active citizenship.

In recognising its importance, UNESCO designated the experiment the runner-up for the 1992 International Literacy Research Award presented by the UNESCO International Institute for Education (UIE), the precursor of the UNESCO Institute for Lifelong Education (UIL). The Director of UIE commended the experiment, adding that it is “a remarkable study carried out in the Nigerian State of Oyo, focusing on a programme combining adult literacy education with indigenous educational methods” (Belanger 1998, p.vii). The Director further described the experiment as providing “both a valuable insight into endogenous African educational practice and a description of a literacy education method that could profitably be applied more widely in Africa” (Belanger 1998, p.vii). He concludes that the project falls within the spirit of the *Agenda for the Future*, which emerged from UNESCO’s Fifth International Conference on Adult Education, held in Hamburg in 1997. That agenda calls for “improving the quality of literacy programmes by building links with traditional and minority knowledge and cultures”, and includes “improving the learning process through learner-centred strategies; sensitivity to diversity of languages and cultures; the involvement of learners in materials development; intergenerational learning processes; and the use of local languages, indigenous knowledge and appropriate technologies” (Belanger 1998, p.vii).

Older adults have remained major beneficiaries of UNIVA initiatives because they have remained on the ground in the rural areas as the younger ones had fled to the urban centres, mostly in search of jobs and opportunities to earn an income.

27.6 The Imperative of Education for Older Adults

The education of older adults in Nigeria must retain many of the basic principles of the indigenous educational system. It must be inclusive, non-discriminating and integrative. The diversity of the Nigerian population must encourage providers to mount programmes which would take care of the diverse groups in the country. The programmes must relate to the needs of the 83,482,348 males and 80,812,168 females in the country (Federal Government of Nigeria 2011). This means that the spiritual, physical, social, material and political needs would have to be considered when designing programmes for older adults as well as mounting suitable programmes and activities. It must take note that adults love growing older gracefully, with minimum stress, tension and pressure and a maximal satisfying learning process. The diversity of religion is also an important factor for the consideration of learning providers. Given the fact, as Bolaji Idowu (1962) puts it, that Nigerians are deeply religious people, and that the older generation is often more conscious of the exit to the unknown world, religious based, spiritually-oriented programmes are likely to continue to determine much of the interest of older learners.

Promoting lifelong learning for older adults in Nigeria will involve the creation of literate societies, the valuing of local knowledge, talent and wisdom. It also entails the promotion of learning through formal, informal and non-formal settings, and taking the best advantage of the new information and communication technologies based on the dividends of globalization. It will encompass learning through involvement in such areas as sports, cultural activities, hobbies, recreation and volunteer activities. The lifelong learning ethos stipulates that learning must be flexible, backed by clear information and advice, and supported by the state, employers, and individuals. If credentialled, learning should lead to qualifications easily understood by all. It should be achievable in manageable steps, relevant to the skill needs of the local economy and equal in status to general qualifications.

On the whole the picture in Nigeria indicates that the country still has a long way to go in this area. Although many *push* strategies have been launched over the years, these have been undermined by *pull* factors. Olayode (2007) has noted the dysfunctionality in education over many decades, due to inadequate planning, mismanagement of resources, weak political will, decaying infrastructures, obsolete facilities, low-quality output, and a general lack of synergy between the multifarious agencies handling matters. Within the context of Universal Basic Education, low drop-out rates, low transition rates, low teacher qualifications and the poor utilization of funds were noted. Also included in the pull factors were inadequate infrastructure, and unqualified teachers. Olayode (2007) complains about the ineffectiveness of the EFA Forum at the national level, which has not had a significant policy and planning presence in Nigeria.

Globalization affects learning and everything else. There is increasing standardisation of practice and increasing internationalization of provision aimed at meeting the demands of the people, as shown by the important work of the Organisation for Economic Cooperation and Development (OECD 1996). People are also becoming more mobile. Hence, there are as many explanations of the meaning and purpose of globalization as there are ideologies and critics discussing the concept (Binde 2004).

However, key within the impact of globalization is the removal of barriers in trade and interaction across international borders. If we must remove barriers, there is the need to determine the extent to which barrier removal is equitable across countries and cultures. Within the context of globalization, the role of lifelong learning would be to mitigate the effects of social and political exclusion, which people may suffer as a result. It is also to ensure parity of systems, enhance trends compatibility, and in some instances, enable system users and workers to relate appropriately to new social trends and patterns. Attempts to separate globalization from internationalization have been at best tenuous as they are arguably two sides of the same coin (Adekanmbi 2000). However, globalization's driving forces are strong, and a response to it would include a proper recognition of what it entails. There is the need to understand its implications for educational planning and policies, and an appropriate response to what it portends for lifelong learning for older adults among other groups. Globalization requires appropriate responses by way of lifelong learning initiatives.

References

- Ade Ajayi, J. F. (1965). The continuity of African institutions under colonialism. In T. O. Ranger (Ed.), *Emerging themes of African history: Proceedings of the international congress of African historians*. Dar es Salaam: East African Publishing House, 1986.
- Adekanmbi, G. (2000). Review (of) higher education through open and distance learning. *Open Learning, 1*(1), 207–210.
- Aderinoye, R. A. (1997). *Literacy education in Nigeria*. Ibadan: University of Ibadan Publishing House.
- Avoseh, M. B. M. (2001). Learning to be active citizens: Lessons of traditional Africa for lifelong learning. *International Journal of Lifelong Education, 20*(6), 479–486.
- Awokoya, S. O. (1982). *The new educational structure: An overview*. Mimeo: University of Ife.
- Awolowo, O. (1960). *Awo: An autobiography*. Cambridge: Cambridge University Press.
- Belanger, P. (1998). Foreword to Omolewa, M., Adeola, O. A., Adekanmbi, G., Avoseh, M. B. M., & Braimoh, D. *Literacy, tradition and progress: Recruitment and retention in a rural literacy programme* (p. vii). Hamburg: UNESCO Institute for Education.
- Bhola, H. S. (1984). *Campaigning for literacy: Eight national experiences for the twentieth century; with a memorandum to decision-makers*. Paris: UNESCO.
- Bhola, H. S. (1990, December 5–20). An overview of literacy in Sub-Saharan Africa in the making. *African Studies Review, 33*(3), 21–25.
- Binde, J. (Ed.). (2004). *The future of values: 21st century talks*. Paris: UNESCO.
- Fasokun, T. (2000, November). Towards the creation of lifelong learning culture in Africa. In G. Youngs, T. Ohsako, & C. Medel-Anonuevo (Eds.), *Creative and inclusive strategies for lifelong learning: Report of international roundtable* (pp. 27–29). Hamburg: UNESCO Institute for Education.
- Faure, E., Herrera, F., Kaddowa, A., Lopes, H., Petrosky, A., Rahnama, M., & Ward, F. (1972). *Learning to be*. Paris: UNESCO.
- Federal Government of Nigeria. (1977, revised 1981). *National policy on education*. Lagos.
- Federal Government of Nigeria. (2011). *Projected population of Nigeria*. Abuja: National Bureau of Statistics.
- Haidara, B. (1990). *Regional programme for the eradication of illiteracy in Africa*. Geneva: UNESCO/International Bureau of Education.
- Idowu, B. (1962). *Olodumare, God in Yoruba belief*. London: Longmans.
- Knowles, M. (1972). *Modern practice of adult education: Andragogy versus pedagogy*. New York: Association Press.
- Kolawole, O. D. (2011). Adults who learn: Sharing literacy project experience from South-western Nigeria. *International Journal of Lifelong Education, 30*(6), 795–813.
- National Archives, Ibadan (NAI) MED (FED) ¼ CDE 465. J.E. Speer to Director of Education, 18 December 1949.
- Obidi, S. S. (1995). Skills acquisition through indigenous apprenticeship: A case study of the Yoruba blacksmith in Nigeria. *Comparative Education, 31*(3), 369–383.
- Oduaran, A. (2000). Globalization and lifelong education: Reflection on some challenges for Africa. *International Journal of Lifelong Education, 19*(3), 266–280.
- OECD. (1996). *Lifelong learning for all*. Paris: OECD.
- Olayode, T. (2007). *Evaluation of EFA coordinating mechanisms, country case study: Nigeria*, Final Report, UNESCO, BREDA.
- Omolewa, M. (1981). *Adult Education Practice in Nigeria*. Ibadan: Evans Brothers.
- Omolewa, M. (2008). Adult literacy in Africa: The push and pull factors. *International Review of Education, 54*, 697–711.
- Omolewa, M., Adeola, O. A., Adekanmbi, G., Avoseh, M. B., & Braimoh, D. (1998). *Literacy, tradition and progress: Enrolment and retention in an African rural literacy programme*. The Rural Literacy Study Group, University of Ibadan, Ibadan. Hamburg: UNESCO Institute for Education.

- Peel, J. D. Y. (1968). *Aladura: A religious movement among the Yoruba*. Oxford: Oxford University Press.
- Sarumi, A. (2001). *Contemporary issues in historical foundations of adult education*. Ibadan: Ibadan University Press.
- Torres, R. M. (2002). Lifelong learning in the North, education for all in the South. In C. Medel-Anonuevo (Ed.), *Integrating lifelong learning perspectives* (pp. 3–12). Hamburg: UNESCO Institute for Education.
- UNESCO. (1962). *International committee of experts on literacy report*. Paris: UNESCO.
- UNESCO. (1976). *The experimental world literacy programme: A critical assessment*. Paris: UNESCO/UNDP.
- UNESCO. (1991). *Literacy and the role of the university*. Paris: UNESCO.
- UNESCO. (1997). *CONFITEA V*, Hamburg: UNESCO.

Chapter 28

Nordic Countries

Tarja Tikkanen

28.1 Introduction

The roots in adult education and lifelong learning for all in the Nordic countries go long back in ‘people’s’ education (*folkeopplysning*, enlightenment for all people), a movement and institution inspired by Grundtvig (Vinther-Jørgensen et al. 2013) on the nineteenth century. Today adult education comprises of general education to all adults, and job-related (occupational and professional) continuing education and training (Ehlers et al. 2011), with broad opportunities and access with very low threshold. A part of the system is the open university (a part of the university), incorporating the University for the Third Age for older people, and also the ‘newspaper university’ in Finland. In an international context the Nordic countries perform well (Dämmrich et al. 2014): participation rates in lifelong learning and skills levels of adults, also older adults, tend to be among the highest in both European and the Organization for Economic Co-operation and Development (OECD) surveys. Furthermore, prior school certificates, and gender, play little role in access to adult education (low stratification) and the educational system shows very low age discrimination, which together facilitate the access of low-skilled, who are often older adults and or migrants (ibid., 2014). Relatedly, the employment rates of older workers (55–64 years) tend to be higher than on average in Europe. Indeed, at least from the perspectives of provision of and access to it looks like the adult education and lifelong learning is a success story in the Nordic countries, particularly for the low-educated.

The aim of this article is to describe the background, current practice and future prospects and challenges of the Nordic approach to lifelong learning of and for adults, focusing on the situation of older adults, aged roughly 50–65 years and still

T. Tikkanen (✉)

Centre for Learning Environment, University of Stavanger, and Faculty of Teacher and Cultural Education, Stord/Haugesund University College, Haugesund, Norway
e-mail: tarja.i.tikkanen@gmail.com

active in the labour market. Both work-related and non-work-related learning are covered. The article presents main issues and trends, not a thorough account of the thematic.

The article is structured into three main parts. The first part describes the ‘Nordic model’, highlighting the theoretical underpinnings, the ideals guiding policy and practice within lifelong learning. The second part presents the performance of the model in terms of participation of older adults in various lifelong learning. Similarities and differences across the Nordic countries, as well as developmental trends herein, are highlighted. Some comparisons are made to the averages in Europe and the OECD countries. Despite its strengths, the Nordic model of lifelong learning is also facing challenges and shortcomings. These vary somewhat by country, but concern in all cases especially non-traditional learners, such as older adults. The final section discusses these challenges, but also future prospects.

28.2 The Nordic Model of Lifelong Learning

28.2.1 Shared Value-Base, Long-Term Political Agreement, Targeted Initiatives

To understand the situation of lifelong learning among older adults, it will be useful to first take an overall look at the ‘Nordic model’. It is the social (equality) and economic (efficiency) system that is most typically referred to as the Nordic model (Andersen et al. 2007). Yet, it has important implications also to other areas in society, such as education. While there are some economic and political differences between the countries (Calmfors 2014), it is the similarities that are more striking (Andersen, et al. 2007).

The Nordic model – the theory, policy, and practice – is built on shared values, traditions, and culture, as well as history, language, and socio-political structure. The core values are equal opportunities, social solidarity and security (flexicurity) for everyone, regardless of gender, ethnicity, religion, conviction, functional capacity, age and sexual orientation (Calmfors 2014; Norden 2013). Respect for human rights, justice, good administration, low level of corruption, democracy, and promotion of health and wellbeing, but also openness and commitment, constitute core foundations in the Nordic model (Norden 2013). Public services are well-developed, high quality, effective – at least in relative terms – and decentralized with universal coverage. The system is built on a widespread trust and fairness concerning the egalitarian ambitions of the welfare state (Andersen et al. 2007; Norden 2007).

There is a long tradition of and strong commitment to cooperation to develop ‘common solutions to common challenges’ across the Nordic countries (Norden 2013) anchored on the co-ordination and political initiatives by the Nordic Council of Ministers (Ehlers et al. 2011). Indeed, cornerstones in the Nordic model are broad cooperation and social dialog. In working life this manifests in a tripartite agreements between the social partners and the government.

28.2.2 The Status of Older Learners Changing along with the Demographic Development

When it comes to the situation of older adults, significant changes have taken place during the past 15 years. Attitudes towards them, especially in working life, have become more favourable, and lifelong learning has become the new ‘norm’, from cradle to the grave, in working life and outside of it. Not unrelatedly, older adults’ participation in lifelong learning and working life has increased. The latter increase is most pronounced until the age of 64-years, while there has been a slight decrease in the age-group 65–74 years (Östlund 2012).

Several factors have contributed to these changes. Firstly, they are a result of long-term work by some agents, such as the resource Centre for Senior Policy in Norway to address the situation of older people in society in general and in working life in particular. Secondly, different targeted programs have been implemented in all Nordic countries to promote older people’s participation in learning and development (Tikkanen et al. 2008). In most of these countries also targeted large-scale governmental programmes have been implemented, such as the National Age Programme in Finland (Ilmarinen 2006) and Life Competence (*Livskompetens*) 50+ in Sweden, with support from the European Union. Thirdly, during the last years there have been targeted initiatives to enhance the development of basic skills among low-educated adults (Ehlers et al. 2011). Fourthly, there has been active work to generally combat discrimination and to promote inclusion in working life. Finally, there are developmental trends in society which have been positively changing the image of and the social and individual experience of being ‘older’, ‘elderly’. Those who are in their 60s today have better health, are better educated, and have had a ‘lighter’ job-career: longer and more vacation periods, shorter working hours, and less heavy physical work.

28.3 The ‘Nordic Standard’ of Lifelong Learning and Targeted Interventions

The question of opportunities (Sørensen and Wathne 2007) is central to the target group in this article, older adults. The question is basically about the extent to which (also) older adults have a choice and options available for them in society to make the most of their lives, individually and collectively, at work and outside of it (Tikkanen et al. 2008). The Nordic model, seeks to allow for such a choice throughout the life-course, lifelong learning being understood as a goal and a means to this end. Also in education there is a strong political commitment to creating conditions for equal opportunities and outcomes for all (Tuijnman 2003; Vinther-Jørgensen et al. 2013). Indeed, in a European context the Nordic countries have been pointed as a region with the best developed and well-functioning adult education system (Vinther-Jørgensen et al. 2013).

Following from the overall Nordic model, there are three main goals for adult education in the Nordic countries (Tuijnman 2003; Tuijnman and Hellström 2001):

- participation in wider society with related notions of democracy, civil society and citizenship;
- adult education and training called upon to help improve the match between educational qualifications and skills, increasingly the key-competences, basic skills, as well as a broad participation in the labour market;
- aim to create an ‘inclusive’ learning society in which participation is truly ‘for all’;

There has been an increased emphasis on lifelong learning since the 1980s and early 1990s, with some variation between the Nordic countries. The lifelong learning system provides general, flexible, low-threshold learning opportunities for all adults on all levels of education, including also targeted measures to older adults, and more recently, to those with low basic-skills. Targeted programs at adult education have been carried out in all Nordic countries (OECD 2012). Besides basic-education, the “programmes aimed specifically at adults typically meet their needs by recognising prior education and work experience, by offering fast educational paths e.g. arranged as evening or part-time education – or by providing courses where adults do not have to study alongside 16 year olds” (Vinther-Jørgensen et al. 2013: 195). Within the broad overall goal and concept of ‘competence’, the strong status of experience-based learning and due recognition of ‘real competence’, strengthens the status of older workers in the labor markets. Still, major challenges prevail. Yet, the recognition of their competence as being different, rather than weaker or less than of their younger counterparts, has gradually gained more footage.

Important principles in the provision of adult education and lifelong learning in the second half of life are that they are flexible, inclusive, needs-adjusted and demands-driven, and broadly available. During the recent years, socio-economic pressures have geared the focus on the concept and practice of inclusion, particularly of the oldest and youngest in the labour market (Halvorsen et al. 2013; Halvorsen and Tägtström 2013). Aside from cross-country cooperation, broad cooperation within the countries between all stakeholders is one of the key aspects in and success factors for lifelong and life-wide learning in the Nordic region (Ehlers et al. 2011). Thus, adult education also appears as a strong tool for social policy. However, cross-national analyses have shown notable variation across countries on a range of indicators, such as the strategies and plans for lifelong learning (ibid.). The conceptual-rhetoric differences between the countries also indicate somewhat different emphasis. For example, while in Norway lifelong learning is incorporated in the overall ‘competence policy’, Finland has transformed their educational policy into a comprehensive ‘lifelong learning policy’.

Thus, while there may perhaps not be a single overarching ‘Nordic model’ to adult education (Tuijnman and Hellström 2001; Vinther-Jørgensen et al. 2013), there are certain ‘patterns’ of adult education and training that are distinctive to the Nordic countries. These are listed by Tuijnman (2003) as high participation rate and volume per capita, high public share in financing, as well as high share of public

providers, and finally, high share of personal interest in education. The new Millennium has witnessed a trend towards more consistent and uniform strategies for implementing lifelong learning in the Nordic countries. While these strategies are in line with the European Union's Lisbon Strategy, it has rather been the Nordic countries as a good example that have inspired the adult lifelong learning policies in the European Union and the OECD than the other way around (Ehlers et al. 2011; Vinther-Jørgensen et al. 2013).

28.4 Participation in Lifelong Learning Among Older Adults

Indicators of the success of the Nordic standard of lifelong learning are high levels participation, high proportion of women, high levels of public investment, and a wide provision of educational activities, also non-work-related, such as the popular movements (study circles, folk high schools, etc.) (Tuijnman 2003). Of the three general preconditions to participation in lifelong learning – opportunities, capability, and motivation – it is the latter, which is hardest to intervene with. Even if older adults would have the opportunity and even capability to participate ('can' participate), it does not mean that they will do so. The rest of the chapter will describe the performance of the 'Nordic model' in the light of education statistics.

The broad availability of learning opportunities, has led to participation, which is notably higher than in other parts of Europe, perhaps especially in case of older adults. Different surveys measure lifelong learning participation in different ways, which makes comparisons across them difficult, sometimes impossible. The starting point here are the two most reliable sources for international comparisons, the European Union (EU) lifelong learning monitoring (based on the EU Labour Force Survey) and the OECD's (2013) survey on adult skills in the *Programme for the International Assessment of Adult Competences* (PIAAC). The EU measure has a more narrow time reference of these two, participation in the last 4 weeks (Eurostat 2013) prior the survey, while the OECD (ibid.) uses an annual frame of reference, participation in the last 12 months prior to the survey. Therefore, the findings are shown parallel.

28.4.1 Lifelong Learning

Table 28.1 shows participation rates in all formal and non-formal learning activities among 55–65 years old adults, separately for the European Union and OECD survey. Participation rates in 2013 are presented for all five Nordic countries and the corresponding average rates in the EU28 and the OECD countries. The Eurostat findings show that the rates varied between about 12 % in Norway to 23 % in Denmark. Compared to the European Union 28 Member States average of 5.7 %, older adults' participation was 2–4 times higher in the Nordic countries. Indeed, in all of these countries (except in Norway) the rates for older adults alone are at or

above the European Union 2020 benchmark of 15 % participation rate among the overall adult population (22–64 years) (European Commission 2009).

The annual participation rates, as measured by the PIAAC, show that more than half (53.7 %) of the older adults in Nordic countries participate in lifelong learning (Table 28.1). These rates, too, varied from closer to 60 % of the older population in Sweden and Denmark to about 7–8 percentage points less in Norway. A comparison to the OECD average (39.1 %), shows that participation in the Nordic countries was 1.4 times higher.

28.4.2 High Participation Rates Reflected in Skills Proficiency and Employer Support

There has been a particular focus on skills development among low-educated adults, such as older learners often also are. The PIAAC concluded that the Nordic countries, again together with the Netherlands, have been most successful in extending opportunities for adult learning to those adults with lowest skills levels (who score at or below Level 1 in PIAAC). PIAAC (OECD 2013) showed that in countries where participation in organised adult learning activities was high, also the skills proficiency (in literacy and numeracy skills) was high, though with large cross country differences. Figures 28.1 and 28.2 show average PIAAC scores in literacy and numeracy in two age-groups, 45–54 years and 55–64 years, in the four Nordic

Table 28.1 Participation in adult education and lifelong learning in the Nordic, Euro28 and OECD countries among adults aged 55–65 years

Region/country	55–64 years (EU ^a)			55–65 years (OECD ^b)		
	% of adults	Difference to Euro28 average		% of adults	Difference to OECD average	
		% units	Ratio		% units	Ratio
Euro28	5.7					
OECD	–			39.1		
Nordic countries	17.6	+11.9	3.1	53.7	+14.6	1.4
Denmark	22.9	+17.2	4.0	56.3	+17.2	1.4
Finland	14.6	+8.9	2.6	51.1	+12.0	1.3
Iceland	18.6	+12.9	3.3	n.a.		
Norway	11.8	+6.1	2.1	49.9	+10.8	1.3
Sweden	19.9	+14.2	3.5	57.5	+18.4	1.5

Source: Eurostat (2013) and PIAAC (OECD 2013)

^aLifelong learning refers to persons of the indicated age-groups who stated that they received education or training in the 4 weeks preceding the survey (European Commission 2013)

^bOECD definition of adult education and training participation: Persons who stated that they participated in formal (towards a certificate, diploma, degree, etc., incl. distance and open education) or non-formal (e.g. on-the-job training, seminars, workshops, private lessons, etc.) organized education or training in the 12 months preceding the survey (OECD 2013)

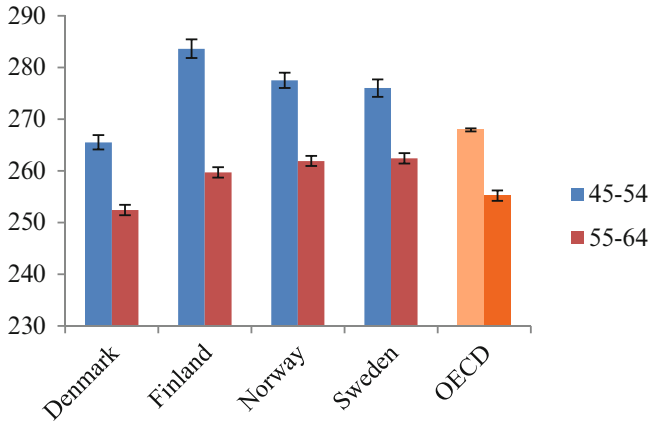


Fig. 28.1 Mean literacy proficiency among older workers 45+ and 55+ ($p < .001$) based on PIAAC (Source: author)

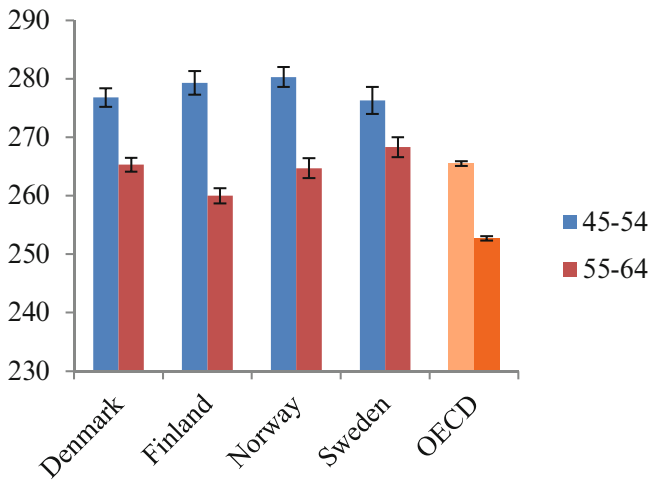


Fig. 28.2 Mean numeracy proficiency among older workers 45+ and 55+ ($p < .001$) based on PIAAC (Source: author)

countries and the OECD. In both skills there is a clear level difference to the OECD averages to the advantage of older adults in the Nordic countries. Yet, the differences across the Nordic countries are smaller. An exception is literacy proficiency in Denmark.

Correspondingly, the shares of employer-sponsored job-related non-formal learning activities among older workers (55–64 years) are 1.4–2.6 times higher in the Nordic countries than the EU28 average (18.2 %) (Eurostat). Perhaps not surprisingly then, the employment rates in this age group in the Nordic countries are

also highest in Europe, varying from about 59 % in Finland to 74 % in Sweden, against the EU28-average 50 % (Eurostat).

28.4.3 Vocational and Professional Education and Training

Denmark, Finland, Norway and Sweden have also general and vocational programmes particularly targeted to adults (Vinther-Jørgensen et al. 2013). While participation rates of older adults are much lower than of younger adults (below 50 years), trends for the time period 2000–2012 (OECD 2014) indicate that they are increasingly using the degree-based education opportunities (see also Tikkanen 2013). Statistics on educational attainment in 2012 shows that the share of older adults (55–65 years) with at least upper secondary education (ISCED-3 level) was notably higher in the Nordic countries, between 71 and 82 % (except in Iceland 61 %) compared to the OECD average, 64 % (OECD 2014). Correspondingly, the rates with older adults holding a tertiary degree, were around 30 % (29–31 %) in the Nordic countries (except in Iceland 25 %), against the OECD average 24 %.

28.5 Future Perspectives and Challenges

This paper has illustrated that with its foundation firmly in the overall ‘Nordic model’, the Nordic approach to lifelong learning, provides frames for adults’ participation in learning activities also in the latter half of life. Active targeting of programs to adults, lately especially those with low skills is part of the approach. Compared to most other parts of Europe and the OECD, the participation of older adults in learning activities is on a clearly higher level, as are their basic skills in literacy and numeracy. Thus, in relation to countries outside the Nordics, also older adults seem to be reasonably well-positioned to lifelong learning.

However, an analysis from within the Nordic countries reveals future prospects, which are both challenging and slightly encouraging. The participation of older adults is still low, much lower than among younger adults. At the moment about a half of the older adult population participates in learning annually. The education accumulation hypothesis (Tuijnman 1991) would suggest that some older adults rarely, if at all, participate in learning activities. There is a reason to be concerned. Especially when we know that large proportions of adults have limited information processing skills, varying between 28 % in Sweden and 46 % in Denmark, and that women, the elderly, those from lower socio-economic backgrounds and lower education, those holding lower-skill jobs, as well as the unemployed and immigrants are less likely to participate in learning (OECD 2012). Targeted initiatives at low-skilled adults have been valuable in this regards. While progress has been made, the overall results have been mixed and varying between

countries – as have the contents and methods of the initiatives been. An example of good success is the “Knowledge Lift” in Sweden.

The rapid demographic change in these countries as such is pushing the need to lengthen working careers. Sufficient incentives are needed to enhance participation in work and learning. On one hand, if low-skilled older workers are to maintain their employability and interesting, motivating job-tasks, participation in continuous skills development is a key. On the other hand, to keep the ageing workers motivated to learn and work, a necessary precondition is that work invites to and stimulates learning, which is not always the case. Furthermore, many employers and managers still have a way to go to understand and appreciate older employees in non-managerial positions and their job-competence (Tikkanen 2011). And it is here that we run short of knowledge. Indeed, research targeted to older learners and their competence vs. competence needs, at work and outside of it, is scarce and has been sporadic. An example is a new research project *Skills development for realizing the workforce competence (SkillsREAL, 2014–2017)*, financed by the Norwegian Research Council, older workers being one of its target groups. It aims, among others, to generate new Nordic comparative knowledge on adult skills, characteristics and attitudes in regards their participation in learning and work. There is also a need to understand better why do the oldest workers least often report of needs for learning and skills development (Tikkanen 2014) and why is self-reported underskilling the lowest among older workers (Cedefop 2010; Tikkanen 2014), when employers’ main concern about older workers’ remains their job-competence (Tikkanen 2011; Zaidi 2008).

Older adults’ increasing participation in lifelong learning may – and should – challenge the traditional system of adult and continuing education, their learning methods and practices developed typically for relatively well-educated, younger participants (Tikkanen 2008). Finally, major challenges are related to the sustainability of the Nordic model as such. A high rate of labour force participation is an indispensable ingredient of the Nordic model (Andersen et al. 2007), but unemployment has been persistently high. Among older adults it was 5–7 % in Denmark, Finland and Sweden, 3 % in Iceland, and a low 1.3 % in Norway in 2013 (Eurostat).

There are also some signs suggesting that older adults will continue to participate in learning, perhaps even in increasing numbers, in the Nordic countries. The silver-lining of the education accumulation hypothesis (Tuijnman 1991) is that when the future older generations will be more educated, also their learning participation is expected to increase. Interestingly, the learning participation rates among older adults have continued to slightly increase in the Nordic countries against the general stagnation in most European countries during the last years (OECD 2014; Vinther-Jørgensen et al. 2013). Secondly, taken that future labour markets increasingly need to rely on older workers, the chances are that continuous development of (also) their skills and competence is likely to attract attention. Thirdly, their exit to retirement in the coming a couple of decades will be so high-numbered in these countries, that it is likely to maintain focus on the skills and competence that will exit with them from enterprises. Fourthly, the rapid development of technology and widening technology use in all spheres of life, are likely to feed older adults’ learning interest,

long beyond the working life. A positive sign as such is that Iceland, Finland and Norway have started to register participation rates in labour force and lifelong learning up to the age 74-years, instead of the traditional 64-years.

A fresh report concludes that, as throughout the ages, the Nordic system has proved its adjustability, the “Nordic model has good chances of thriving well into the future” provided that it stays as such, able to refocus and recalibrate in a realistic scale as needed (Valkonen and Vihriälä 2014: 4). Within it, challenges remain to motivate older adults to participate in learning, either to maintain and/or enhance their employability or to develop their knowledge and skills in line with their personal interests.

References

- Andersen, T. M., Holmström, B., Honkapohja, S., Korkman, S., Söderström, H. T., & Vartiainen, J. (2007). *The Nordic model: Embracing globalization and sharing risks*. The Research Institute of the Finnish Economy (ETLA). Helsinki: Taloustieto Oy.
- Calmfors, L. (2014). How well is the Nordic model doing? Recent performance and future challenges. In T. Valkonen & V. Vihriälä (Eds.), *The Nordic model – Challenged but capable of reform* (pp. 17–90). Copenhagen: Nordic Council of Ministers.
- Cedefop. (2010). *The right skills for silver workers: An empirical analysis* (Cedefop Research Paper 8). Luxembourg: Office for Official Publications of the European Communities.
- Dämmrich, J., Vono de Vilhena, D., & Reichart, E. (2014). Participation in adult education in Europe: The impact of country-level and individual characteristics. In H.-P. Blossfeld, E. Kilpi-Jakonen, D. Vono de Vilhena, & S. Buchholz (Eds.), *Adult learning in modern societies: An international comparison from a life-course perspective* (pp. 29–55). Cheltenham: Edward Elgar.
- Ehlers, S., Wärvik, G.-B., Larson, A., & Thång, P.-O. (2011). *Effektive strategier for livslang læring i de nordiske lande* [Effective strategies for lifelong learning in the Nordic Countries]. Copenhagen: Nordic Council of Ministers.
- European Commission. (2009). *Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training ('ET 2020')* (2009/C 119/02). Luxembourg: Official Journal of the European Union.
- European Commission. (2013). *Education and training monitor 2013*. Luxembourg: Publications Office.
- Eurostat. (2013). European Union definition of lifelong learning and statistics shown in the text, retrieved by the author from the interactive European lifelong learning database at <http://ec.europa.eu/eurostat>
- Halvorsen, B., & Tägtström, J. (2013). *A matter of health and job satisfaction: Seniors, work and retirement in the Nordic region* (Summary). TemaNord 2013:543. Copenhagen: Nordic Council of Ministers.
- Halvorsen, B., Hansen, O.-J., Tägtström, J., & Flø, R. (2013). *Å skape et inkluderende arbeidsmarked. Om inkludering av unge, funksjonsnedsatte og seniorer i Norden* (et sammendrag). TemaNord 2013:537. Copenhagen: Nordic Council of Ministers
- Ilmarinen, J. (2006). *Towards a longer worklife! Ageing and the quality of worklife in the European Union*. Helsinki: Finnish Institute of Occupational Health.
- Norden. (2007). *What lies ahead for the Nordic model? A discussion paper on the future of the Nordic welfare model in a global competition economy*. ANP 2007:725. Copenhagen: Nordic Council of Ministers.

- Norden. (2013). *A good life in a sustainable Nordic region: Nordic strategy for sustainable development*. ANP 2013:728. Copenhagen: Nordic Council of Ministers.
- OECD. (2012). *OECD skills strategy spotlight: Better skills, better jobs, better lives – Nordic skills policies*. A summary report from a Nordic seminar 22 October 2012. Available at: http://skills.oecd.org/developskills/documents/Highlights_OECD_Nordic_seminar.pdf
- OECD. (2013). *OECD skills outlook 2013: First results from the survey of adult skills*. Paris: OECD.
- OECD. (2014). *Education at a glance*. Paris: OECD.
- Östlund, B. (2012). *Kunskapsöversikt. Jobba längre – vad vet vi om äldre i arbetslivet?* Report 2012:10. Director of Labour (Arbetsmiljöverket).
- Sørensen, B. A., & Wathne, C. T. (2007). *Bærekraftig arbejdsliv. Arbejdsudviklingen i Norden*. TemaNord 2007:530. Copenhagen: Nordisk Ministerrådet
- Tikkanen, T. (2008). *Promoting learning among older (45+) adults. Focus on training the trainers. TOP+ project*. Leonardo da Vinci. European Commission. IRIS Reports 2008/297.
- Tikkanen, T. (2011). From managing a problem to capitalizing on talent and experience of older workers (Editorial). *The International Journal of Human Resource Management*, 22(6), 1215–1218.
- Tikkanen, T. (2013). Elinikäinen oppiminen – kohti aktiivista vanhuutta [Lifelong learning – Towards an active ageing]. In E. Heikkinen, J. Jyrkämä, & T. Rantanen (Eds.), *Gerontologia* (3rd ed., pp. 509–525). Helsinki: Duodecim.
- Tikkanen, T. (2014). Lifelong learning and skills development in the context of innovation performance: An international comparison. In B. Schmidt-Hertha, S. Jelenc Krašovec, & M. Formosa (Eds.), *Learning across generations: Contemporary issues in older adult education* (pp. 95–120). Rotterdam: Sense Publishers.
- Tikkanen, T., Guðmundsson, B., Hansen, L. E., Paloniemi, S., Randle, H., & J., Sandvik (2008). *Lifelong learning: New visions and opportunities for older workers in the Nordic countries?* Copenhagen: The Nordic Network for Adult Learning (NVL)/Nordic Council of Ministers.
- Tuijnman, A. (1991). Lifelong education: A test of the accumulation hypothesis. *International Journal of Lifelong Education*, 10(4), 275–285.
- Tuijnman, A. C. (2003). A 'Nordic model' of adult education: What might be its defining parameters? *International Journal of Educational Research*, 39(3), 283–291.
- Tuijnman, A. C., & Hellström, Z. (2001). *Curious minds: Nordic adult education compared*. Copenhagen. TemaNord 2001:9. Copenhagen: Nordic Council of Ministers.
- Valkonen, T., & Vihriälä, V. (Eds.). (2014). *The Nordic model – Challenged but capable of reform*. TemaNord 2014:531. Copenhagen: Nordic Council of Ministers.
- Vinther-Jørgensen, T., Armangué, L., Andersen, T. J., Lauridsen, S., Mogensen, M., Rishede Philipsen, M., & Høxbroe Jeppesen, L. (2013). *Uddannelse for voksne* [Education for adults]. TemaNord 2013:575. Copenhagen: Nordic Council of Ministers.
- Zaidi, A. (2008, March 1). *Features and challenges of population ageing: The European perspective*. The European Centre for Social Welfare Policy and Research, Policy Brief.

Chapter 29

Peru

Blanca López La Vera

29.1 Ageing in Peru

The number of persons aged 60-plus in Peru consists of 2,907,138. According to official data, older adult population in Peru reaches 9.4 % of the total population (Instituto Nacional de Estadística e Informática 2014). Of these, nearly 33 % are concentrated in Lima, the capital city, where the older adult population reaches 10.4 % of its total number of inhabitants. The growth of this population segment is highly accelerated. Each year, the number of older persons increases by 3.3 %, while the total country population increases by 1.1 %. Groups of persons aged 80-plus grow at an annual rate of 5.0 % whilst the 75–79 age cohorts increase by 3.8 % (Instituto Nacional de Estadística e Informática 2013a). As in other countries and regions, the segment over 75 with the fastest growing rate.

Although the current Peruvian population is essentially young, the demographic scenario will vary within a few years due to the rate of growth of the population aged 60-plus and the declining fertility rate of 3.6 in 1990 to 2.4 in 2010 (Instituto Nacional de Estadística e Informática 2009). Having a younger population, with their own problems not adequately addressed (employment, health, education), requires the State to focus its attention and resources on this population segment, neglecting older persons, for whom the care provided is focused on extending healthcare rather than preventing; supporting extreme poverty with specific programmes; and recreation, through walks, visits and celebrations organised by public institutions.

Furthermore, looking at the living conditions of the population aged older than 65 years, which in Peru is the official retirement age, one finds that only 32 % are in

B.L. La Vera (✉)

Departamento de Comunicaciones, Facultad de Ciencias y Artes de la Comunicación,
Pontificia Universidad Católica del Perú, Lima, Perú
e-mail: blopez@pucp.edu.pe

receipt of a retirement pension, and of those, only a small percentage of the ones who live in non-extreme poverty have coverage, while almost none of the extreme poor do (Morón 2008). The current average retirement pension is United States 205 Dollars a month, which is below the minimum living wage. Yet, the vast majority of persons aged 65-plus are in receipt of income around AD\$. 130 (Ministry of Economy and Finance 2004). This income does not allow self-sustaining, so that older adults require family support.

This low coverage implies that the remaining 68 % keep on working until the forces or health permit. Duran et. al. (2008: 20) notes that “one of the most important findings in the profile of the older population of Peru is its high degree of participation in the labor market”, where 42 % of participant in older adult education are part of the economically active population, being Peru one of the countries in South America with the highest percentage of older adults working informally.

This situation is mainly due to the fact that the informal economy in Peru is approaching 70 % (Rodríguez and Higa 2010). According to Loayza (2008), the informal sector comprises businesses, workers and activities that operate outside the legal and regulatory frameworks governing the economic activity. This involves being outside tax burdens and legal standards and therefore not having the protection and services that the State provides to the company or its workers.

This results in a high rate of informal workers who cannot enjoy a retirement pension or access to social security benefits at the end of their working lives. For those lacking opportunities, good health or having physical limitations, and not being able to generate their own income, the consequences are greater poverty, poor access to health care or medicines, family dependency, and few resources or opportunities that allow enjoying free time. To this, one should add the economic and social inequality expressed in 25.8 % of poverty levels (Instituto Nacional de Estadística e Informática 2012), and the weakening of the family structure with fewer young members who are likely to care for their elders. In this context, education is an option that is not among the priorities of the majority of older adults, and that is not readily available, even for those with a pension, as this is insufficient to cover their basic expenses.

29.2 Educational Characteristics of Older Adults

In Peru, people aged 60-plus are part of a generation whose main characteristic was their low education and high illiteracy. Today, of all people over age 60, 22.2 % are illiterate, and of these, nearly half (43.8 %) are in rural areas of the country, being mostly women. The same source indicates that 45.5 % of older adults has studied a year of primary education, 21.6 % a year of high school, and 14.8 % a year of higher education (Instituto Nacional de Estadística e Informática 2013a).

But illiteracy has declined rapidly in recent decades in cohorts that are below 60, and simultaneously the educational level in those who are entering that age increases.

Thus, in the general population according to the national census, illiteracy has declined from 18.1 % in 1980 (Oficina Regional de educación para América Latina y El Caribe-UNESCO 2001) to 6.2 % on average in 2012 (Instituto Nacional de Estadística e Informática 2013b). And, by 2013, there has been an increment in the proportion of people in the segment over 60 with higher education: 14.8 % compared with 2003, which was 6.9 % (ibid.). These new cohorts configure a different scenario for the next few decades because of its higher education, higher life expectancy and overall more years of useful and active life.

One cannot fail to mention the existence of generational expectations. People approaching retirement age grew under the influence of developmental currents spread in Latin America between the years 50 and 70 of the last century that influenced national education policies, promoting a strong link between level of education and better living conditions, thereby incorporating into the imagery of the population, the important role of education as a means of promotion, mobility and social progress and democratization channel (García 2008; Mollis 2000).

29.3 Older Adult Education: University Programmes, State and Other Actors

The educational experiences developed with older adults come mainly from three actors: state, development agencies and universities. From the university, the slow development of these experiences can be explained, among others, by the following:

- University proposals contain structured curricula, in some cases more rigid than others, with college-level content, some pre-requisites, and professors used to teaching younger students. Consequently, older adults with lower educational levels, have difficulties adapting or simply reject the exigencies, restricting their incorporation into the programmes.
- The cost, although variable, is another restriction given the low percentage of elderly who receive pension and are free to use it freely or for personal sake, since they are embedded in the family group where the priority is to work for the family or to educate younger members.
- The existence of educational proposals to older adults coming from the state and non-governmental agencies that become affordable and viable options because they are charge-free, with few restrictions, non-requirement of pre-training, flexibility, among other benefits appreciated by them.
- The absence of a government policy to promote the education of older people with consequential incentives or subsidy leading to a lack of development of these experiences in public universities, restricting access of older adults who may have proper conditions and would wish to receive education in universities.

On account of the mentioned above, following is a brief analysis of the various educational experiences aimed at older in Peru. Primarily, the educational proposal of the State, is best understood by knowing the options it develops:

- Social Security as part of their care programme to retirees through the health institution Sistema Nacional de Salud (ESSALUD), promoting active aging, family integration and providing training in self-care, vocational workshops, art, etc., plus geriatric services. ESSALUD is the institution with the most time and coverage in the country with this service, being primarily recognized for care and health promotion, rather than its educational proposal. ESSALUD reaches approximately 80,000 seniors in the country and has been working for more than 30 years.
- At a municipality level, through the elderly centres Centros Integrales del Adulto Mayor (CIAM), their participation is promoted as neighbours. Seeking improvement in their quality of life and offering workshops similar to those at ESSALUD, these institutions do not have a structured educational proposal. Only 5 % of all municipalities in the country have a CIAM and the implementation of courses depends on their financial resources, which vary according to the economic capacity of the neighborhood or area in which they are located. There is no exact information about their coverage, but does not exceed 5 % of that of ESSALUD's (there are 4,011 municipalities nationwide among provincial, district and villages, according to official classification based on the number of people they serve).
- There are only two public universities with education programmes for older adults. These are usually created at the initiative of scholars sensitive to the issue, usually supported by a university authority. There is no interference or involvement of the State as such, in these initiatives.

The country has no policy of education for the elderly. A brief reference can be found in the Law for the Elderly 28803, in force since 2007 (Congreso de la República del Perú 2006). It provides a regulatory framework to promote exercise and respect of their rights and improve their quality of life. It is proposed as one of their rights, access to education and training programmes that will allow them to remain productive. The Ministry for Women and Vulnerable populations (Ministerio de la Mujer y Poblaciones vulnerables 2013) coordinates with other government agencies to develop job training programmes for the elderly, primarily to form micro enterprises. But no mechanisms to ensure compliance are established, and therefore, only few results have been achieved. The courses and workshops offered by ESSALUD and the municipalities are efforts to fill a gap facing the demand of seniors eager to learn, whose aspiration do not happen to be a university education for various reasons. Yet, they are not a structured curricular educational proposal, with clear objectives and explicit skills development.

Secondly, initiatives of non-governmental organisations generally fall under social intervention projects developed in communities in rural and marginal urban areas, proposing among other objectives: poverty reduction, protection of their rights, promotion of active and healthy ageing and, building of citizenship. These

interventions have an educational component tied to the objectives of the projects, such as training in organic gardens, training of community leaders, self-care, caregiver training, human rights, etc. The persistence or continuity thereof, depends on funding, duration and the type of project, something which often prevents more coverage and permanence in the time of the educational offer, or a more articulated proposal with more comprehensive educational goals in the medium or long term.

Thirdly, one finds very few Universities with an educational academic programme that target older adults. There are only four universities that have educational programmes for seniors, two of which are public and two private. The oldest university is 13 years old and the newest is three. There is no public information on the number of beneficiaries, but from coordination carried out, it results that about 600 older adults enrol in the four universities annually. About one-third are students who enrol for the first time, being common characteristic that students enrol repeatedly over several cycles if they do not follow a rigid curriculum. These programmes' broad objectives are to improve their quality of life; integrate them into society; provide them with an integral education; promote healthy aging; among other related ones. But in their specific objectives you can find interesting differences. Thus, public universities proposal is to form the older adults in business and tourism for their insertion in the labour market and to train gerontological promoters to provide a service (paid or unpaid) to their community integration, respectively. Training, more functional and practical, implies a more rigid curriculum, with compulsory basic training courses and few elective courses from other disciplines. These programmes have almost no cost, and are therefore more accessible to older people with an interest in university education.

The proposal developed by private universities includes courses that train in specific skills or capabilities (microenterprises, experience consultants, tai chi instructors, among others), but these are only a part of a broader approach with a humanistic aim. The curriculum is flexible, with articulated courses and workshops that allow a comprehensive humanistic education over the medium term. Nonetheless, being a private university, it has a cost, and that causes a certain selectiveness in the socio-economic background of their students. Both proposals – public and private – represent two models that coexist in the university *educational offer* directed at older adults in Peru, and correspond as such to the coexistence of two types of current *educational demand* in this age group. We observe these two types of demand in research carried out (López 2010b), where we identify, among other results, a segment coincident with people older than 75 years of age – a generation for which a professional specialization had not been a priority or essential – who want to have an university experience more to compensate for individual deficiencies: sharing, entertaining, updating knowledge or fulfilling a postponed dream; and, on the other hand, another segment that coincides with people younger than 75, who want to feel active and capable, even contributing to society by being educated in specific useful, applicable skills and abilities, and which would allow them to even generate some type of income for themselves. There is no exact delineation regarding the ages that enter into one or the other group, although they did demonstrate quite clear tendencies as observed in the research.

It therefore follows that the coming cohorts of older adults will demand from universities, educational alternatives designed for them. The need to be up-to-date, to improve abilities and capabilities or to professionalize will be priority for a generation that will be expected to fulfil more requirements and will be more demanding in a more competitive educational and working context, and for whom education would be an option to stay active and productive. The university system today is not ready nor has it been preparing to embrace an older population with singular learning characteristics, extensive life experience and educational and personal expectations ranging from studying for entertainment (having friends, going out), going through subjective and cognitive needs (confirmation of still being able to learn and do), to the necessity for survival (to work or access higher revenues).

29.4 Key Concepts and Theoretical Perspectives on Older Adult Learning

Education of older people, and specifically the increase in experiences and, thus, in different models and educational practices, has generated in the past two decades deliberation of the theoretical and methodological aspects of this practice and therefore, the elucidation of its nature as a scientific discipline, its field of development and implementation, its connection and differences with other related fields such as education and gerontology, and the particularities of its methodology, among other things (Yuni and Urbano 2005; García 2004; Requejo 2009; Lirio 2008; Yuni and Urbano 2008; Sánchez 2005; Montero 2005). At the same time, there is still a revision going on to the concepts and myths about old age, in light of progress in the understanding of this stage of life, and its characteristics, interests, needs, feelings and own knowledge (Requejo 1999; Martínez 2007; Fernández-Ballesteros 2000; Yuni and Urbano 2007; Calero and Navarro 2006).

In this scenario, Peru just starts its praxiological and theoretical itinerary of older adults' education, with clear prospects to accelerate in the coming decades. Today however, there is no substantial reflection on the education of older people, its meaning, references, objectives or implications to allow us to identify which concepts and theoretical approaches underlie or are linked to the different experiences that are being developed. The State and other development agencies have not systematized their educational experiences with older adults nor have they opened any reflection that may allow us to recognize their frames of reference. However, in the minds of some educators the concept of Andragogy as conceptual and theoretical basis supporting interventions is gaining a place, although there is no revision of the application of its principles and methodologies, or feedback of the concept from their experiences. It is more the conceptual aspect than the methodological of the andragogic proposal which was collected in these experiences.

The field of educational experiences at universities has witnessed the introduction of the concept of 'gerontagogy' (joining the Greek words 'geron' [old, old

person] and ‘agogia’ [conduct, guide]), a concept proposed by André Lemieux (1997) who defined it as an interdisciplinary educational science whose object of study is the older adult learner, In other words, understood as the science that deals with the study of methods and techniques aimed at educating older adults “the science that studies the older adult educational act and its possibilities” (García 2004: 118). This concept – still in deliberation – articulates a body of knowledge and experiences developed in the field of education of older people in the world that allows a demarcation with Andragogy and those who still conceive appropriate to speak of pedagogy of the elderly. Gerontology is still a science in construction, requiring the understanding of the characteristics of the elderly in a learning situation, and involving the recognition and acceptance of their skills, abilities, build up experience, physical or cognitive personal processes and limitations, and their needs, interests, and ways of dealing with the educational process. From my own perspective, education of older people requires to be thought and worked out as has been done for many years with Pedagogy in reference to the child and with Andragogy to the adult, years later. And this requires specification of the scientific nature of gerontology, about which is still no consensus. Although it has defined a subject of study, it requires developing its own doctrine, and a defined methodology (Vásquez 2005). This would delimit its field and scope as educational science aimed at older adults.

29.5 Where Is Older Adult Educational Practice Going?

This chapter has discussed the conditions involved in the current configuration of education aimed at older adults in Peru, as well as reviewing their likely future scenarios in a prospective look. But the expected demographic, educational, and socio-economic setting for the country and the future OA, will force the government to realize that the elderly education is a preventive option against potential social complications given the vertiginous aging rate of the population under conditions of inequality and exclusion. The incorporation of the elderly to educational options in any form, promotes their cognitive protection (Abarca et al. 2008), expands support networks, develops skills, etc. thus preventing or delaying deterioration and therefore physical and mental health problems that require care and attention and would have to be addressed by the State or charged to the family economy (López 2010a, 2012).

Universities have to be prepared to respond to a demand or need that will increase in the coming decades, rethinking their parameters for old adult education: purpose, objectives and curriculum proposals as well as its methodological, assessment and certification aspects. State and universities must meet the educational expectations of older adults, associated to their need to generate their own income, feel useful, and take charge of their own life; those educational options should train them to develop a productive activity according to their abilities and interests thus strengthening their independence, autonomy, and ability to decide on the issues involving health or welfare and their lives. It is noteworthy that by ‘productive ageing’ one refers to any activities carried out by an older person that produces goods and

services, whether paid or unpaid, and that provide a benefit or have a value for others. Hence, caring for grandchildren or home, or working for pay, would be productive activities.

Due to all these reasons, the main challenge for educators of seniors is to prepare themselves. Older adult education involves the development of specific skills and considerations and deep knowledge of the learner. Moreover, it implies learning to work accepting the differences related to each and every particular life experience, but also other equally important characteristics, like the socio-economic background and gender. Older adult education, as well as in any intervention for older adults from any other disciplines, should do inter and multi-disciplinary work (Fernández-Ballesteros 2000), to ensure a holistic approach.

29.6 Case Study: The Initiative of the University of Experience Programme (UNEX) for Persons Aged 50-Plus

It is difficult to validate the success or failure of learning in a university programme for the elderly, whereas most of those in Latin America have lacked an evaluation system to measure that learning. The reasons for this are both older students themselves who initially rejected evaluation stress, and the fact that the vast majority of programmes do not offer any formal accreditation of the acquired knowledge.

However, leaving aside the pending debate on the desirability or necessity of developing an evaluation system, its modalities, the desire of older students to be evaluated under different manners and their own testimonies of learning, the truth is that there is identified meaningful learning as an outcome of educational activities yet not directly related to the courses or their content, but to the interaction of students with their teachers, with other students, with their learning environment, their families and communities, enhancing personal development at cognitive, attitudinal and emotional levels, at social skills, and of impact on family and community (López 2010b). In this framework, a brief sharing of the results of research carried out, specifically on the experience of University of Experience (UNEX) programme promoted by the Pontifical Catholic University of Peru (López 2013).

In this programme, project leaders strived to determine the impact of experiencing the programme's classrooms in a group of older male and female students on various personal dimensions, and specifically regarding control of their own lives and their environment. Students were asked them to compare the self-perceived changes before and after participating in the programme, based on a set of indicators. Among other interesting results, respondents claimed to feel greater personal security expressed to a greater knowledge and use of themes and situations, as they had better and clearer ideas; more confidence in themselves and their ability to perform various activities, and greater determination to make decisions. Furthermore, a perception of greater personal autonomy, self-control and tolerance; greater

control of the environment expressed in defending their rights and feeling able to do and say, with more self-confidence to learn and start new projects; greater respect from their immediate family and friends; whilst also strengthening their relationships and self-confidence. They explicitly recognised that having acquired more knowledge from studying makes them feel supported, safe, ‘having less shame’ of being wrong and express their opinions with greater security, among other results.

The project concluded that participation in the educational process and all this act implies beyond acquiring knowledge, is able to positively transform various aspects of life of the elderly. Therefore, it is worth rethinking about the usual assessment parameters for this segment, integrating other levels of achievement and thus other evaluation models. In this sense, saying that a learning experience is a success or a failure will depend on what you call successful experience and the criteria that evaluate it as such.

References

- Abarca, J., Chino, B., Llacho, M., Gonzales, K., Mucho, K., Vázquez, R., Cárdenas, C., & Soto, M. (2008). Relación entre educación, envejecimiento y deterioro cognitivo en una muestra de adultos mayores de Arequipa. *Revista Chilena de Neuropsicología*, 3(1), 7–14.
- Calero, M., & Navarro, E. (2006). *La plasticidad cognitiva en la vejez: Técnicas de evaluación e intervención*. Barcelona: Octaedro.
- Congreso de la República del Perú. (2006). Ley 28803. *Ley de las Personas Adultas Mayores*. 21 de Julio. <http://www4.congreso.gob.pe/ntley/Imagenes/Leyes/28803.pdf>. Accessed 20 Oct 2013.
- Durán, F., Mendoza, W., & Picado, G. (2008). *Proyecciones demográficas y financieras para el análisis de la viabilidad de las pensiones no contributivas en el Perú*. Lima: Organización Internacional del Trabajo-OIT/Oficina Subregional de la OIT para los Países Andinos/Fondo de la población de las Naciones Unidas.
- Fernández-Ballesteros, R. (2000). *Gerontología social*. Madrid: Pirámide.
- García, J. (2004). *La educación en personas mayores: Ensayo de nuevos caminos*. Madrid: Narcea.
- García, E. (2008). Auge y decadencia del desarrollismo en América Latina. Análisis desde una de sus estrategias centrales: el planeamiento de la educación. *Revista Iberoamericana de Educación* n.º 46/1. <http://www.rieoei.org/2218.htm>. Accessed 5 Oct 2013.
- Instituto Nacional de Estadística e Informática. (2012). *Encuesta Nacional de Hogares. Población en Situación de Pobreza según ámbitos geográficos*. Lima. <http://www.inei.gob.pe/estadisticas/indice-tematico/sociales/>. Accessed 10 Oct 2013.
- Instituto Nacional de Estadística e Informática. (2013a). *Encuesta Nacional de Hogares*. <http://www.inei.gob.pe/media/MenuRecursivo/boletines/ninez-y-adulto-mayorjul-set-2013.pdf>. Accessed 20 Nov 2013.
- Instituto Nacional de Estadística e Informática. (2013b). *Tasa de analfabetismo de la Población de 15 años a más*. <http://www.inei.gob.pe/buscador/?tbusqueda=analfabetismo+por+año>. Accessed 29 Nov 2014.
- Instituto Nacional de Estadística e Informática. (2014). *Día Mundial de la Población*. Lima. http://www.inei.gob.pe/media/MenuRecursivo/publicaciones_digitales/Est/Lib1157/libro.pdf. Accessed 28 Nov 2014.
- Instituto Nacional de Estadística e Informática, Fondo de Población de las Naciones Unidas-UNFPA, Comisión Económica para América Latina de las Naciones Unidas – CEPAL (2009). *Perú: Estimaciones y proyecciones de población 1950–2050*. Boletín de Análisis Demográfico

- N° 36. <http://www.unfpa.org.pe/publicaciones/publicacionesperu/INEI-Peru-Bol36-Estimaciones-Proyecciones-1950-2050.pdf>. Accessed 28 Nov 2014.
- Lemieux, A. (1997). *Los programas universitarios para mayores: Enseñanza e investigación*. Madrid: Imerso.
- Lirio, J. (2008). *La gerontología educativa en España: realidad sociodemográfica y concepciones de aprendizaje de los alumnos de la universidad de mayores José Saramago de la sede de Talavera de la Reina de la Universidad de Castilla La Mancha*. Tesis doctoral, Universidad Complutense de Madrid. <http://eprints.ucm.es/8315/1/T30671.pdf>. Accessed 18 Oct 2013.
- Loayza, N. (2008). Causas y consecuencias de la informalidad en el Perú. *Revista de Estudios Económicos N° 15, 1*, 43–64. Banco Central de Reserva (BCR).
- López, B. (2010a). La transición entre ocupar el tiempo libre y empoderar: perspectivas de la educación universitaria dirigida al adulto mayor. *Ageing Horizons, 9*, 82–99. <http://www.ageing.ox.ac.uk/publications/ageing-horizons>. Accessed 10 Feb 2011.
- López, B. (2010b). Retos y perspectivas de los Programas Universitarios para Adultos Mayores: Una revisión a partir de la práctica. *Revista Palabras Mayores, 2*(4). <http://revistas.pucp.edu.pe/index.php/palabramayores/article/view/3611> Accessed 15 Apr 2010.
- López, B. (2012). Subjetividad y salud mental en la vejez: la pertinencia de empoderar a los adultos mayores. In A. Chávez (Coord.), *La salud mental y el malestar Latinoamericano. Encrucijadas, debates y posicionamientos* (pp. 183–204). Buenos Aires: Manantial.
- López, B. (2013). Empoderamiento y adultos mayores: Impacto de la participación de un grupo de adultos mayores en un Programa educativo. In V. Montes de Oca (Ed.), *Envejecimiento en América Latina y el Caribe. Enfoques interdisciplinarios en Investigación y docencia de la Red Latinoamericana de Investigación en Envejecimiento*. Instituto de Investigaciones Sociales (pp. 207–248). Mexico: Universidad Nacional Autónoma de México UNAM.
- Martínez, S. (2007). La motivación para participar en procesos de formación en la vejez: desafíos metodológicos. In D. Alonso, J. Lirio, & P. Mairal (Eds.), *Mayores activos: Teorías, experiencias y reflexiones en torno a la participación social de las personas mayores* (pp. 119–155). Madrid: Biblio-Arjé/La Factoría de ediciones y Producciones.
- Ministerio de Economía y Finanzas. (2004). *Los sistemas de pensiones en el Perú. Dirección General de asuntos económicos y sociales*. http://www.mef.gob.pe/contenidos/pol_econ/documentos/sistemas_pensiones.pdf. Accessed 16 May 2013.
- Ministerio de la Mujer y Poblaciones vulnerables. (2013). *Plan Nacional para las Personas Adultas Mayores 2013–2017*. http://www.mimp.gob.pe/files/planes/plan_nac_pam_2013-2017.pdf. Accessed 25 Sept 2013.
- Mollis, M. (2000). La educación comparada de los años 80: memoria y balance. In J. Calderón (Coord.), *Teoría y desarrollo de la investigación en educación comparada* (pp. 105–118). México: Plaza y Valdez.
- Montero, I. (2005). *El interés de las personas mayores por la educación: qué educación. Estudio de campo*. Tesis doctoral. <http://hera.ugr.es/tesisugr/15428345.pdf>. Accessed 22 Oct 2010.
- Morón, E. (2008). *Resolviendo el problema de cobertura en el Perú. Documento de discusión*. Lima: Centro de Investigación de la Universidad del Pacífico.
- Requejo, A. (1999). Educación de adultos y programas universitarios para personas mayores. *Revista de Estudios y Experiencias Educativas, 14–15*, 109–130. Spain: Facultad de Ciencias de la Educación, Universidad Santiago de Compostela.
- Requejo, A. (2009). La educación de ‘personas mayores’ en el contexto europeo. *Revista Efora, 3*, 45–63. http://campus.usal.es/~efora/efora_03/articulos_efora_03/n3_01_requejo_osorio.pdf, www.usal.es/efora. Accessed 23 May 2012.
- Rodríguez, J., & Higa, M. (2010). *Informalidad, empleo y productividad en el Perú* (Documento de Economía N° 282). Lima: Departamento de Economía/Pontificia Universidad Católica del Perú/Cartolan Editora y Comercializadora E.I.R.L.
- Sánchez, M. (2005). Los programas universitarios para mayores en España: Algunas reflexiones para aprender de los errores ajenos. In M. Castro Pinto & J. Veloso (Eds.), *University programmes for senior citizens* (pp. 1–18). Portugal: Facultad de Letras Universidad de Porto.

- UNESCO – Oficina Regional de Educación para América Latina y El Caribe. (2001). *Situación Educativa de América Latina y El Caribe, 1980–2000*. http://www.oei.es/quipu/situacion_educativa1980_2000.pdf. Accessed 28 Nov 2014.
- Vásquez, E. (2005). *Principios y técnicas de educación de adultos*. Costa Rica: Editorial Universidad Estatal a Distancia- UNED.
- Yuni, J., & Urbano, C. (2005). *Educación de adultos mayores: Teoría investigación e intervenciones*. Córdoba: Brujas.
- Yuni, J., & Urbano, C. (2007). La educación como factor de oportunidad para el desarrollo de las personas mayores. In D. Alonso, J. Lirio, & P. Mairal (Eds.), *Mayores activos: Teorías, experiencias y reflexiones en torno a la participación social de las personas mayores* (pp. 87–117). Madrid: Biblio-Arjé/La Factoría de ediciones y Producciones.
- Yuni, J., & Urbano, C. (2008). Cartografía de experiencias educativas con personas mayores en el ámbito latinoamericano. *Revista Palabras Mayores*. <http://revistas.pucp.edu.pe/index.php/palabramayores/article/view/1361>. Accessed 14 Sept 2008.

Chapter 30

Portugal

Paula Guimarães and Fátima Antunes

30.1 The Debate on the Elderly and Ageing

As is the case in many other countries, the reflection on ageing has also attracted the attention of researchers in Portugal in the last century. Analyses have primarily emerged from areas such as biology, demography, medicine and psychology. More recently, namely in the last two decades, studies inspired by other fields of Science, such as sociology, politics and education, have promoted interdisciplinary research and crossover debates about the different problems associated to the elderly and the ageing process. Themes arising from these discussions have focused on the role played by senior citizens in the social structure and the impact on individuals' lives of the changes which have occurred, especially those relating to the increasing inequalities that the more elderly have been subjected to. Other reflections have dealt with the result of the elderly individual's biographical choices and lifestyle, highlighting the relationship between agency and social structure. Most noteworthy are the studies on the ageing of the Portuguese population (Rosa 2012) of a demographic and sociological inspiration, while some deal with the concepts relating to the elderly person and ageing (Simões 2002, 2005; Marques 2011), others broach the cycles of life associated to human and psychological development (Marchand 2005) and still others focus on the promotion of well-being in the elderly adult (Lima et al. 2001; Simões et al. 2003; Simões 2005).

In the context of these interdisciplinary debates, gerontology stands out as an area which favours the discussion of the biological, psychological and social

P. Guimarães (✉)

Instituto de Educação, Universidade de Lisboa, Lisbon, Portugal
e-mail: pguimaraes@ie.ulisboa.pt

F. Antunes

Centre of Research on Education, University of Minho, Braga, Portugal
e-mail: fantunes@ie.uminho.pt

processes of old age and ageing. In this domain, preferred analyses have highlighted: (i) the functional problems of the elderly, with regard to their incapacities and difficulties, which prevent them from living an independent life; (ii) the ageing process throughout life, in psychological terms, and its result from a social perspective; and (iii) age, understood as a pattern that determines the social behaviour expected from subjects of an older age group. Closer to the concerns of a sociological nature, social gerontology has studied the impact of social, cultural and environmental conditions on the ageing process and on old age. This has benefitted from contributions concerning individual ageing recorded in specific historical, political, social and economic contexts. In line with these ideas, the study of active ageing has underlined the process of optimisation of the opportunities for health, participation and safety, so as to augment life quality during ageing (Paúl 2005). Foremost are the issues of social participation, health and safety. These research studies focus on the ageing process, at the individual and social levels, the elderly person's maintenance of his physical, psychological and social autonomy, so that he is able to retain the capacity for decision-making and control over his own life. Following on from social gerontology, some authors have developed studies in the context of educational gerontology. This area covers the ageing processes, those of an educational character as well as the needs directed at individuals who are more elderly. It is for this reason that gerontology is distinguishable from the education of elderly adults; it favours processes through which older subjects, either individually or as a group, reflect on the knowledge they possess, attribute new meanings and/or transform the knowledge, capacities and forms of knowledge which they usually resort to.

30.2 The Debate on Older Adult Learners

In the area of adult education, the issue of education for the elderly has equally enjoyed greater attention. The themes covered are varied, though one must emphasise the work undertaken regarding the wisdom of the elderly, intergenerational and communal learning, the role of governmental and non-governmental organisations (such as Third Age Universities, also known as Universities for the Elderly and Senior-Citizen Universities). These have promoted education for adults and the elderly, and have lent new meaning to the learning process undertaken by older individuals. In addition, they have focused on models of learning and teaching for this social group, such as geragogy, and on the guidelines and educational policies, be they public, supra/international or national, directed at these individuals (Veloso et al. 2011; Krasovec and Radovan 2012). Despite these developments, learning for older adults is still presented as an emerging issue. It undoubtedly benefits from relevant contributions, yet what is also true is that this is a domain which is far from presenting a well delineated object of study. Not least are the various definitions adopted for the elderly person, as well as the perspectives of old age and of ageing preferred by researchers. In fact, some cases register normative and prescriptive choices of perspective, which translate the processes of education and learning to be

followed by the elderly and by adult educators; others, however, reveal guidelines which are more critical and more comprehensive, since they seek to question and clarify the sense of education for this social group.

In Portugal, the discussion regarding the education of elderly adults has followed the tendencies mentioned previously, though this is still scanty, especially in three distinct areas of analysis which are, in some cases, able to interconnect. In this sense, some authors have debated the elderly individual and the promotion of well-being (Lima et al. 2001; Simões et al. 2003), which Simões (2002, 2005) designates as 'ageing well', thus denoting the great influence of psychology and a preference for a quantitative approach. Others have opted to reflect on the relation between the elderly and community development, which draws attention to the role of civil society organisations in the implementation of programmes and projects aimed at more elderly individuals (Fragoso 2012). In this case, there has been a selection of sociological and educational perspectives, with the prevalence of qualitative methods. Amongst these, one should highlight case studies and data collection techniques such as the interview survey and life stories. Additionally, others have discussed the policies directed at this social group (Velo 2011), in the context of sociology and the study of educational social policies; these have primarily resorted to investigation methods that combine case studies, documentary analysis and the interview.

30.3 On Social and Educational Public Policies Directed at Older Adult Learners

From the abovementioned approaches, some have underlined the relation between the social processes, which are macro in character, in the context of the conception and adoption of public policies. They have also focused on the guidelines and programmes for social and educational support that the more elderly population can benefit from. It is here that some issues have guided the debates, namely those of how social processes shape public policies, how they condition the elderly person's experience and promote the social constructs of the elderly person, third age and ageing (Velo 2009, 2011). Other issues still point to the impact of these policies on different social groups, namely those who are older, and to the results of globalisation – in all of its dimensions – for societies and especially for the elderly (Baars et al. 2006; Borg and Formosa 2013). Approaches can still be found which deal with individuals and their learning activities; for example, how these individuals are able to influence social structures when they act, the interdependence of learning individuals, the agency and social structure (Friebe and Schmidt Hertha 2012; Fragoso 2012).

More specifically, on the subjects of elderly adult education and the State's role in defining the orientation and adoption of public policies, the authors who have worked most in this area have emphasised the importance that some international organisations, such as the United Nations (2001), have had in the definition of the

elderly person, as well as in the purposes and processes inherent to the public policies directed at that social group. In this sense, the World Health Organization (2013) resorted to a chronological criterion to define the elderly person, and considered that this pertains to an individual who is above 60 years of age in developing countries, and above the age of 65 in the case of more developed countries. It is, indeed, interesting to see that this difference in social and economic development levels is profoundly related to the marker of biological age used to consider a person to be elderly, especially in relation to the age when subjects abandon active life, thus benefitting from retirement. It is for this reason that the role of the State is relevant in a social construction for the elderly and ageing, since it is when the elderly individual leaves active life that he/she gains a new social status and therefore assumes new social roles, benefitting from ensuing established forms of support. Thus, social policy constructs the elderly person when it answers questions such as, 'what is an elderly person?', 'who can benefit from social support?', given that the definition of the age required to obtain social benefits generates a great impact on people's lives (Bengston et al. 2009).

UNESCO (1998, 2009) has, in turn, played a significant role in adult education, namely through the work undertaken in the context of its International Conferences on Adult Education. On drawing attention to this contribution, Veloso pointed to the fact that this entity often attributes a differentiated status to the elderly in comparison to other adults, namely as being deprived adults or as subjects with specific educational needs, so that it is important to conceive activities for this case where there is a favourable educational environment to promote the participation of those who are older (Veloso 2011).

With regard to the European Union, it is especially after 2006 that it attributed an increasing importance to subjects of older age, within the framework of lifelong learning, although there is no apparent specific preoccupation with this social group (Veloso 2011; Formosa 2012a, b, 2014). Population ageing has emerged as a problem which is demographic, economic, social, political, cultural and civic in nature. In line with these ideas, different forms of orientation have been adopted in the context of education for the elderly. After all, 2012 was considered by this supranational organization to be the European Year of Active Ageing and Solidarity between Generations, a circumstance which reveals this issue's transnational character. Besides the countless activities which took place during this year, as a result of the demographic shift associated to population ageing, the European Union has also been confronted with a drop in the active population above the age of 50. This tendency has placed great strain on the structures of the welfare state belonging to member states. This is chiefly due to the adoption of programmes which aim to ease the individual's departure from the labour market and the acceptance of early retirement by older workers; yet, there is a labour shortage in some sectors of the economy, resulting from the early retirement of older individuals, whose job positions are not filled by younger employees. It is within this framework that adult education for the elderly has acquired greater importance in the orientations adopted by this supranational organisation, namely in the conception and development of programmes of reintegration of the elderly in the labour market. This was undertaken

in the context of active employment policies and an ideology of productive ageing (Formosa 2012b). Due to the vocational and highly derogatory nature of these initiatives for the social status of the elderly in contemporary societies, various researchers have expressed great criticism – they consider these actions to be a negation of the right to education and to full citizenship. Despite the fact that the European Union has sought to define a coherent strategy for the best possible ageing, and has in this case contemplated the adoption of healthy lifestyles and everyday activity, various activities have, in fact, focused on keeping subjects in the labour market for a longer period of time and have delayed transition to retirement (Velo 2011).

30.4 Public Policies and Socio-educational Action with Older Adults in Portugal: Some Notes

30.4.1 Social Conditions and Public Policies Involving Senior Citizens

There has been little theoretical debate concerning the elderly and adult learning in Portugal, and this has resulted in the reduced development of public policies, as well as unfavourable social conditions for much of this population sector. The senior citizen's condition is generally represented in sombre hues, not only because it is seen as the problem of ageing societies but also due to the fact that the elderly constitute one of the population segments of great vulnerability and an effective rate of poverty (EAPN 2013). One of the reasons for this is the reduced amount paid out in retirement pensions to a significant portion of the older population, resulting from equally low salaries and the fact that some pensioners and retired people did not make deductions during their careers or that the deduction period was not long enough. This is a consequence of the relatively recent nature of the pension contribution scheme, as well as a welfare system that is still gaining maturity. An example of this is the universal right to a retirement allowance.¹

It was only after the revolution on the 25 April 1974, which brought a 48-year dictatorship of the *Estado Novo* to an end, that decisive steps were taken to build the welfare state, including the establishment of a universal system of social protection during old age (Velo 2011). The 1976 Constitution consecrates this important endeavour, while also subscribing to a wider conception of a “third age policy”, in the sense of providing the elderly with “opportunities to create and develop paths of self-fulfilment through active participation in community life” (Government of Portugal 1976). In this manner, Portuguese society fleshed out its social rights during a historical moment, counter to the process of construction of the so-called

¹It is noteworthy that “the poverty rate of the elderly in Portugal which, in a period of 15 years... dropped from approximately 40 % in 1993 to 21 % in 2009” (Rodrigues et al. 2012: 187).

European social model and to the worldwide economic situation. Thus, the economic crisis of the 1970s and 1980s, in the twentieth century, which triggered the debate on the welfare society, had its implications for Portugal. The people had the historical experience of simultaneously going through the crisis and consolidation of the welfare state which, in this context, took on the form of a (semi) welfare state, given its structural fragility, producing implications in important domains, such as the notions that ‘social rights are the citizens’ rights’, or the full enjoyment of these by generations of beneficiaries (Santos 1990, 1993).

In the last decades, and throughout the 1990s, the welfare state was subjected to questioning and retraction, amongst us in the form of mitigated neoliberalism (Afonso 1998). Owing to these factors, the “processes of the transfer of responsibility from older generations in the family to society (to the State, the worker and the employment entity) (Fernandes 1997: 23)” (Cardoso et al. 2012: 607) never became solidly and durably rooted. During the last decade of the twentieth century, the debate surrounding the reform of social security became more expressive, with an increasing tendency to promote both the policy of assistencialism, as well as that of individual responsibility in the face of vital risks, with a preference for the transfer of a significant part of the coverage of those risks to the market of insurance companies, thus opening up new business areas to replace collective and public responsibility for the dignity and well-being of members in the community. As a result, there was then a proliferation of programmes, players and actions (Cardoso et al. 2012). These phenomena were also nurtured by the State, which reinforces or creates the civil society to whom it delegates responsibilities and hands over areas of intervention, or with whom it draws up contracts for the rendering of services. This tendency, which has been extensively identified in the public policies of the managerial state (Clarke and Neuman 1997), takes place without necessarily resulting in the empowerment of this secondary civil society (Santos 1990). Neither is this the case of participation or organised and autonomous action by citizens, nor in their influence on policies or even in a corresponding improvement in social well-being (Hespanha et al. 2000). On the contrary, this transfer of responsibilities seems to occur, instead, within the framework of the State’s interwoven processes of expansion in civil society, together with its omission and disengagement from responsibility regarding social rights and well-being, while the process of dispersion of the State’s power (Clarke and Neuman 1997) is nonetheless translated into a strong condition of a civil society under tutelage (Hespanha et al. 2000), when it comes to actions organised by citizens.²

Along this social and historical journey, Portuguese society has experienced an ‘unfinished modernity’ (Machado and Costa 1998), characterised by the most marked social inequalities in the EU, which are the foundation for a “dual class-

²Various studies in Portugal, both on the development of public welfare policies, as well as more specifically on adult education, have recurrently observed and analysed the interconnection of the tendencies pointed out which are, indeed, in tune with the more extensive political and economic dynamics of Europeanisation and globalisation (Clarke and Neuman 1997; Hespanha et al. 2000; Lima and Afonso 2006; Guimarães 2011; Antunes 2013).

structure, in relation to its cultural capital, [which] (...) nurtures inequalities of a different nature: the monopoly of participation and representation of elites restricts the influence of lower social classes in state's intervention" (Carvalho 2012 – online version).

30.4.2 Public Policies of Adult Education and Older Adult Learning

In the sphere of education, and in a particularly acute manner, this historical experience has revealed the absence of a global and integrated public policy and system for adult education. These gaps have resulted in a blocked project and this is chiefly due to the sinuous process and to the structural discontinuity of the public policies for adult education, which is also true of the 40 years of democracy (Melo et al. 2002). In this sense, Melo was able to bitterly point to the prevalence of the hundred-year-old project by the elites of population's programmed obscurantism (Melo 2004), which democracy did not succeed in neutralising. The history of adult education thus points to a lengthy omission of systematic public policies throughout the entire twentieth century, intermittently interrupted by measures and programmes, which was markedly campaign-like in nature, and whose effects never allowed – as might be expected – for a change in the situation of the Portuguese population's structural educational deprivation (Melo et al. 2002; Candeias 2009).

In this way, far from constituting an integrated cross-sectional response in the multifaceted universe of adult education, older adult learning has timidly emerged on the margins of the (central) State's intentional intervention. More recently, it has become diversified in the junction of self-organised movements, as well as social and educational initiatives, launched by a segment of the senior population, both through agencies in the educational, cultural and social, public and private domains, along with those of local power bodies. It is, therefore, an area of practice which is still being formed. As a result, it is rather heterogeneous and fragmented – if not divided into segments – where unique forms of dynamics are to be seen. These reveal some continuity and visibility (such as Senior-Citizen or Third Age Universities), with educational proposals which are about to be consolidated and one-off occasional activities, even if they sometimes do take place on a regular basis.

30.4.3 Organised Action and Social-Educational Dynamics with Senior Citizens

In Portugal, older adult learning consists of a dynamics which, although not yet far-reaching and still of a rather weak consistency, has become increasingly visible since the beginning of the twenty-first century. This is due to the proliferation of

social and educational initiatives involving senior citizens, which can be seen practically everywhere. These are set in motion by cultural centres and are often, though not only, promoted by the municipality (museums, libraries, etc.), as well as by organisms of local authority (for example, the parish council), or by third sector institutions associated to social action and still others which are locally developed. These initiatives are characterised by their diversity and fragmentation: one does not often find an articulated set of proposals, but rather more or less successful attempts at responding to perceived needs and/or the promotion of access or enjoyment of these cultural benefits by this population sector. It is also through these means that an empowerment of individuals and/or development of community resources may occur. Whatever the case, this dissemination of initiatives for adult education in the field has proved to be visible enough to necessarily deserve being registered here.³ However, it has still not become sufficiently extensive to find its expression in statistical studies.⁴ It does not constitute a topic for research either, so that one might then have access to compiled data – even if this were partial or local – or to intensive studies, which would allow for a better understanding of the nature of the social and educational processes being undertaken.

Nevertheless, it is the intentional involvement of the elderly population in social and educational dynamics which is most visibly and greatly expressed in the self-organised movement of Senior Citizen/Third Age Universities. This has occurred in Portugal since 1976, which is rather early if one considers the relatively recent emergence of this topic amongst ourselves (Veloso 2007); and, furthermore, as previously mentioned, there has also been a delayed, difficult and unfinished consolidation of basic social and human rights, including the universal institutionalisation of protection for the elderly and the social benefit of retirement. Indeed, shortly after the launching of the first Third Age University in France (Toulouse), the first institution of this kind appeared in Portugal. According to the entity RUTIS (Rede de Universidades da Terceira Idade [Network for Third Age Universities]) which officially federates these institutions,

Third Age Universities are a social and educational response, which aims to create and stimulate regular social, cultural, educational and leisure activities, preferably for and by people over the age of 50. When there are educational activities, these will occur informally,

³The recent national survey on Education and Training (Instituto Nacional de Estatística 2013) refers for the first time older adults (55–69 years old) participation in formal and non formal education activities. In general, participation rates concerning people aged 55–69 years old are lower than the ones for the rest of the Portuguese population (18.9 % for older adults but 45.9 % for the rest of the population aged 18–54 years old), being 2.3 % (but 15.4 % for the rest of the population) for the participation in formal education and 17.5 % (but 39.2 % for the rest of the population) in non-formal education.

⁴For example, one recent study draws attention to the fact that only 11 % of the interviewees registered attendance at courses or training actions through their own initiative or involvement in any artistic activity; at least 27 % mention going to the cinema, concerts, the theatre, museums, galleries or art exhibitions; approximately one quarter state that they participate in activities directed at pensioners, or the so-called third age, promoted by certain entities and institutions (Cabral et al. 2013: 163, 188 ff.).

so that there is no purpose for certification, and will take place in the context of lifelong education. (RUTIS 2008 – online version)

These educational institutions further define their objectives as being the civic participation and self-organization by senior citizens, the promoting entities of which must strictly be non-profit-making, and that Third Age Universities should primarily operate with voluntary teachers/promoters who provide educational responses in domains which range from social and human sciences to mobility and sport, including arts and crafts, as well as new technologies/computer skills (RUTIS 2008). Universities of the Third Age have expanded significantly in the last decade, from a few dozen to approximately two hundred institutions, and from an initial involvement in activities of less than 5000 to 35,000 senior citizens (Jacob 2012; RUTIS 2012). Even if one were to admit that this number is rather low (about 1, 6 %) in relation to the 2 million residents in Portugal who are over the age of 65, this is still a significant expression of the current distribution throughout the country.⁵ As a social and educational response and activity, Third Age Universities have been characterised as a predominantly urban middle-class movement, involving segments of the Portuguese population who are better educated than the average (Veloso 2011). According a recent study:

With regard to the entity where most time is spent in the last 12 months, (...) the [only] statistically significant differences found were those concerning the education level. Individuals with a higher level of education (higher education) can be distinguished from those who only concluded basic education in so far as the former spend more time at recreational associations and at third age universities. (Cabral et al. 2013: 168)

At the same time, a study of eight Senior-Citizens Universities, dated 2008, points to a greater heterogeneity of the audience covered, the majority of which are situated between the 7th and 12th years of education and with about one quarter (23 %) not having concluded the 6th year (Network for Third Age Universities 2008: 2). On the other hand, and suggesting that the growth in the number of these Universities and of the subjects involved in activities may have led to a diversification of their audience, in the same study one is able to observe that, of the 15 interviewees who claim to attend Senior-Citizen Universities, 9 had concluded basic education and 6 had concluded secondary school or had higher education (4 in every 10) (Cabral et al. 2013: 167); however, regarding the age groups one is dealing with here, the percentage of the Portuguese population who completed secondary and higher education does not quite reach the ratio of 2 in every 10.

⁵ It was estimated that in 2012 there would be about 4 million adults between the ages of 15–64 in Portugal, whose highest level of complete education was distributed across various levels of schooling, without exceeding basic education. In the same year, 131.521 adults were registered in basic and secondary education; this is approximately 3 % of the potential demand for formal adult education at a non-superior level. These values are mentioned with the purpose of creating a better context of the significance of the social and educational dynamics revolving around TAU which, though they cover a tiny portion of the population over the age of 65 (around 1.5 %), still reveal a scope whose order of greatness is not far removed from that which formal AET (Adult Education and Training), as a state policy, undertook in the same year (DGEEC and DSEE 2013: 57).

It has been some years since the RUTIS association, the entity which federates Senior-Citizen Universities, has seen its statute acknowledged as an IPSS (Private Institution of Social Solidarity) of public utility. These institutions have thus been involved in governmental undertakings and have participated in promoted official events, rallying around the European Year of Active Ageing and Solidarity between Generations 2012 (Rutis 2012).

30.5 Concluding Remarks

In Portugal, the debate on the elderly and ageing has followed the lines of the most expressive international discussions, although this is still only being approached by a rather minimal number of national researchers. In the case of adult learning, there are two preferential topics: the first discussion revolves around the issues of ageing and ‘ageing well’, in which adult education takes on an important role in the occupation of leisure time, as well as the promotion of well-being and social, cultural and civic participation, etc.; the second pertains to a debate on social and educational public policies, of which there are generally few and where little value is attributed to the role of the elderly in contemporary Portuguese society. At the same time, the educational practices which involve the elderly, though still few, have registered a significant increase, both in the case of those which ensue from self-organization, such as Senior-Citizen Universities, the project highlighted by this article, as well as those which seek to stimulate and respond to senior citizens’ aspirations to participation. These developments are particularly centred on non-formal and informal education initiatives undertaken by extremely differentiated entities and projects. It is perhaps for these very reasons that these practices have not been greatly delved into; yet, both the fields of older adult education and learning, as well as knowledge thereof, are acknowledged realities in the making.

Acknowledgements The writing of this chapter was supported by the Unit of Research and Teaching Policies of Education and Training (Unidade de Investigação e Ensino Políticas de Educação e Formação) of the Institute of Education of the University of Lisbon (Portugal), funded by the Foundation for Science and Technology (Fundação para a Ciência e Tecnologia/FCT). (Paula Guimarães)

The writing of this chapter was supported by the Center of Research on Education (Centro de Investigação em Educação/CIEd) of the Institute of Education of the University of Minho (Portugal), funded by the Foundation for Science and Technology (Fundação para a Ciência e Tecnologia/FCT) under the Project PEst-OE/CED/Ui1661/2014. (Fátima Antunes)

References

Afonso, A. J. (1998). *Políticas educativas e avaliação educacional*. Braga: Universidade do Minho/CEEP edições.

- Antunes, F. (2013). Reforma do Estado e políticas públicas: a governação em acção. Notas de um estudo no campo da Educação e Formação de Adultos em Portugal. In M. Vera & Peroni (Eds.), *Redefinições das fronteiras entre o público e o privado: Implicações para a democratização da educação* (pp. 82–119). Brasília: Liber Livro.
- Baars, J., Dannefer, D., Phillipson, C., & Walker, A. (2006). Introduction: Critical perspective in social gerontology. In J. Baars, D. Dannefer, C. Phillipson, & A. Walker (Eds.), *Ageing, globalisation and inequality: The new critical gerontology* (pp. 1–12). Amityville: Baywood Publishing Company.
- Borg, C., & Formosa, M. (2013). Active citizenship and late-life learning in the community. *Lifelong Learning in Europe*. <http://www.lline.fi/en/article/research/220133/active-citizenship-and-late-life-learning-in-the-community>. Accessed 6 Oct 2014
- Bengston, V., Vern, L., Gans, D., Putney, N., & Silverstein, M. (Eds.). (2009). *Handbook of theories of ageing*. New York: Springer.
- Cabral, M. V., Ferreira, P. M., Silva, P. A., Jerónimo, P., & Marques, T. (2013). *Processos de envelhecimento em Portugal. Usos do tempo, redes sociais e condições de vida*. Lisboa: Fundação Francisco Manuel dos Santos.
- Candeias, A. (2009). *Educação, estado e mercado no século XX. Apontamentos sobre o caso português numa perspectiva comparada*. Lisboa: Edições Colibri/FCSH-UNL.
- Cardoso, S., Santos, M. H., Baptista, M. I., & Clemente, S. (2012). Estado e políticas sociais sobre a velhice em Portugal (1990–2008). *Análise Social*, 204(XLVII(3)), 606–630.
- Carvalho, T. (2012). *Obstáculos de classe à cidadania em Portugal*. <http://observatorio-das-desigualdades.cies.iscte.pt/index.jsp?page=projects&id=122>. Accessed 13 Aug 2012.
- Clarke, J., & Neuman, J. (1997). *The managerial state*. Londres: Sage.
- Direção-Geral de Estatísticas da Educação e Ciência (DGEEC), & Direção de Serviços de Estatísticas da Educação (DSEE). (2013). *Estatísticas da Educação 2011/2012*. Lisboa: Direção-Geral de Estatísticas da Educação e Ciência (DGEEC).
- EAPN (Rede Europeia Anti-Pobreza/Portugal). (2013). *Indicadores sobre a pobreza. Dados Europeus e Nacionais*. http://www.eapn.pt/documentos_visualizar.php?ID=322. Accessed 10 Oct 2013.
- Fernandes, A. A. (1997). *Velhice e sociedade: Demografia, família e políticas sociais em Portugal*. Oeiras: Celta Editora.
- Formosa, M. (2012a). Critical geragogy: Situating theory in practice. *Journal of Contemporary Educational Studies*, 63(5), 36–54.
- Formosa, M. (2012b). European Union policy on older adult learning: A critical commentary. *Journal of Aging and Social Policy*, 24(4), 384–399.
- Formosa, M. (2014). Four decades of Universities of the Third Age: Past, present, and future. *Ageing and Society*, 34(1), 42–66.
- Fragoso, A. (2012). Older learners in the community? Provocative reflections on the situation of older adults in Portugal. *Journal of Contemporary Educational Studies*, 63(5), 70–83.
- Friebe, J., & Schmidt Hertha, B. (2012). Educational activities and barriers for elderly people in the community. In S. Krasovec & M. Radovan (Eds.), *Intergenerational solidarity and older adults education in community. The third conference of the ESREA network on education and learning of older adults* (pp. 65–78). Ljubljana: Znanstvena založba Filozofske fakulteta.
- Government of Portugal. (1976). *Constituição da República Portuguesa*. Art. 72. http://www.pgdlisboa.pt/leis/lei_mostra_articulado.php?nid=4&tabela=leis. Accessed 8 Nov 2013.
- Guimarães, P. (2011). *Políticas de educação de adultos em Portugal (1999–2006). A emergência da educação e formação para a competitividade*. Braga: Centro de Investigação em Educação/ Instituto de Educação-UM.
- Hespanha, P., Monteiro, A., Ferreira, A. C., Rodrigues, F., Nunes, M. H., Hespanha, M. J., Madeira, R., Van den Hoven, R., & Portugal, S. (2000). *Entre o estado e o mercado. As fragilidades das instituições de proventos social em Portugal*. Coimbra: Quarteto.
- Instituto Nacional de Estatística. (2013). *Inquérito à educação e formação de adultos 2011. Aprendizagem ao longo da vida*. Lisboa: Instituto Nacional de Estatística.

- Jacob, L. (col. Jesus, A., & Sampaio, J.) (2012). *Universidades seniores: Criar Novos projetos de vida*. Almeirim: RUTIS
- Krasovec, S., & Radovan, M. (Eds.). (2012). *The Third conference of the ESREA network on education and learning of older adults*. Ljubljana: Znanstvena založba Filozofske fakulteta.
- Lima, L. C., & Afonso, A. J. (2006). Políticas públicas, novos contextos e actores em educação de adultos. In L. C. Lima (Ed.), *Educação não-escolar de adultos. Iniciativas de educação e formação em contexto associativo* (pp. 205–229). Braga: Universidade do Minho/Unidade de Educação de Adultos.
- Lima, M. P., Oliveira, A. L., & Godinho, P. (2001). Promover o bem-estar de idosos institucionalizados: um estudo exploratório. *Revista Portuguesa de Pedagogia*, 45(1), 165–183.
- Machado, F. L., & Costa, A. F. (1998). Processos de uma modernidade inacabada. In J. M. Leite Viegas & A. F. da Costa (Eds.), *Portugal, que Modernidade?* (pp. 17–44). Oeiras: Celta.
- Marchand, H. (2005). *A idade da sabedoria*. Lisboa: Ámbar – Ideias no Papel S. A.
- Marques, S. (2011). *Discriminação da terceira idade*. Lisboa: Fundação Francisco Manuel dos Santos.
- Melo, A. (2004). A ausência de uma política de educação de adultos como forma de controle social e alguns processos de resistência. *Fénix – Revista Pernambucana de Educação Popular e de Educação de Adultos*, 3(3), 17–26.
- Melo, A., Lima, L. C., & Almeida, M. (2002). *Novas políticas de educação e formação de adultos*. Lisboa: ANEFA.
- Paúl, C. (2005). Envelhecimento activo e redes sociais de suporte social. *Sociologia, Revista da Faculdade de Letras*, 15, 275–287.
- Rodrigues, C. F. (coord.); Figueiras, R., & Junqueira, V. (2012). *Desigualdade económica em Portugal*. Lisboa: Fundação Francisco Manuel dos Santos.
- Rosa, M. J. V. (2012). *O envelhecimento da sociedade Portuguesa*. Lisboa: Fundação Francisco Manuel dos Santos.
- RUTIS/Network for Third Age Universities. <http://www.rutis.pt/>. Retrieved on 8 Nov 2013.
- RUTIS – Rede de Universidades da Terceira Idade. (2008). *Caracterização das Universidades da Terceira Idade em Julho de 2008*. <http://www.rutis.org>. Accessed 8 Nov 2013.
- RUTIS Report of Activities. (2012). <http://www.rutis.org/>. Retrieved on 8 Nov 2013.
- Santos, B. S. (1990). *O estado e a sociedade em Portugal (1974–1988)*. Porto: Afrontamento.
- Santos, B. S. (1993). O estado, as relações salariais e o bem-estar social na semiperiferia: O caso português. In B. S. Santos (Ed.), *Portugal: um Retrato Singular* (pp. 15–56). Porto: Afrontamento.
- Simões, A. (2002). Envelhecer bem. *Revista Portuguesa de Pedagogia*, 39(1), 217–227.
- Simões, A. (2005). Um novo olhar sobre os idosos. *Revista Portuguesa de Pedagogia*, 36(1/2/3), 559–569.
- Simões, A., Ferreira, J. A., Lima, M. P., Pinheiro, M. R., Vieira, C., Matos, A., & Oliveira, A. (2003). O bem-estar subjectivo dos adultos: um estudo transversal. *Revista Portuguesa de Pedagogia*, 37(1), 5–30.
- UNESCO. (1998). *V conferência internacional de educação de adultos*. Lisboa: Ministério da Educação.
- UNESCO. (2009). *Global report on adult learning and education*. Hamburg: UNESCO Institute for Lifelong Learning.
- United Nations. (2001). *World population ageing, 1950–2050*. New York: UNESCO.
- Veloso, E. (2007). As universidades da terceira idade em Portugal: um contributo para a análise da sua emergência. *Revista Portuguesa de Pedagogia*, 41(3), 263–284.
- Veloso, E. (2009). Terceira idade: uma construção social. *Revista Galego-Portuguesa de Psicologia e Educación*, 17(1–2), 9–21.
- Veloso, E. (2011). *Vidas depois da reforma*. Lisboa: Coisas de Ler.
- Veloso, E., Guimarães, P., Martins, F., Silva, D., & Faria, M. (Eds.). (2011). *Elderly, education, intergenerational relationships and social development. Proceedings of the 2nd conference of ELOA*. Braga: Universidade do Minho/Cied.
- World Health Organization. (2013). *Definition of an older or elderly person*. <http://www.who.int/healthinfo/survey/ageingdefnolder/en/>. Accessed 7 Nov 2013.

Chapter 31

Republic of Korea

Youngwha Kee and Yunji Kim

This chapter looks at the development of older adults' education in the Republic of Korea (South Korea). We begin with a brief overview of the demographic trends in the Republic of Korea and identify some of the issues that older adults face to suggest that education can effectively address them. Next, we discuss the legislations that frame older adults' education: *the Senior Citizens Employment Promotion Law* (1991), *the Senior Citizens Welfare Law* (1997) and *the Lifelong Education Law* (1999). We then introduce the various organizations that are involved in senior education programmes. Finally, we identify the limitations of current programmes and give suggestions for future reforms.

31.1 Ageing Issues: Demographic and Socio-Cultural Characteristics

31.1.1 Demographic Characteristics

Moving Towards an Aged Society Despite government efforts, Korea is experiencing significant changes to its population structure. In 1980, the older population (persons over 65) was a mere 3.8 % of the entire Korean population, and the majority (62.2 %) were productive persons (15–64 years). By 2000, the proportion of senior citizens (over 65 years old) had risen to 7.2 %, thus Korea officially became

Y. Kee (✉)

Department of Lifelong Education, Soongsil University, Seoul, South Korea
e-mail: key@ssu.ac.kr

Y. Kim

Department of City and Regional Planning, Cornell University, Ithaca, NY, USA
e-mail: yk634@cornell.edu

Table 31.1 Population structure by age group

	1980	1996	2000	2005	2006	2010	2017	2026
Total population	38,123	45,524	47,008	48,138	48,371	49,410	50,976	52,042
0-14 years	12,950 (34.0)	10,403 (22.9)	9911 (21.1)	9241 (19.2)	8988 (18.6)	7975 (16.1)	6840 (13.4)	6695 (12.9)
15-64 years	23,716 (62.2)	32,326 (71.0)	33,701 (71.7)	34,530 (71.7)	34,790 (71.9)	35,982 (72.8)	37,017 (72.6)	34,506 (66.3)
65 years and over	1456 (3.8)	2794 (6.1)	3394 (7.2)	4366 (9.1)	4592 (9.5)	5452 (11.0)	7118 (14.0)	10,839 (20.8)

Source: National Statistical Office (2012), *Future Population Forecast*, authors' translation

Note: numbers in parentheses represent percentage of total population

(Unit: 1,000 persons)

an “ageing society” (defined as having an aged population between 7 and 14 %). According to projections by the National Statistical Office, the ratio will increase to 14 % by 2017 (“aged society”), and finally Korea will become a “super-aged society” by 2026 with 20.8 % of the population over 65 years. Table 31.1 shows the population size of each age group.

This change in population structure will have significant implications for the nation’s labour market as well as its social safety net policies that require contributions from the productive population (15–64 years).

Rural-Urban Divide The ageing phenomenon also shows differences along the urban-rural spectrum. The rural areas have a higher ratio of the older population – since most people in the labour market move to urban areas in search of jobs – and the ratio of elderly population is also increasing at a faster rate in rural areas. For example, in 2000, the elderly made up 5.5 % of the entire urban population while they made up 14.7 % of the rural population. By 2005, the numbers increase in both urban (7.2 %) and rural (18.6 %) areas, but the increase in rural areas (+3.9 %) is about twice as large as the increase in urban areas (+1.7 %). The difference in ageing statistics between rural and urban areas are cause for concern given that most educational facilities for senior citizens, as well as other social services, are clustered in urban areas, restricting access for older persons in rural areas.

31.2 Socio-Cultural Characteristics

All demographic characteristics described above are closely related to social and cultural characteristics. In this section, we start with suicide statistics that can be seen as a symptom of alienation of the older population.

Suicide Rates Currently, Korea has the highest suicide rate among OECD countries. In particular, suicide rates of older people are very high as can be seen in Table 31.2.

Table 31.2 Suicide rate by age group in 2013

	10–19 years	20–29 years	30–39 years	40–49 years	50–59 years	60–69 years	70–79 years	80 years and over
Suicide rate	4.9	18.0	28.4	32.7	38.1	40.7	66.9	94.7

Source: Korea Statistics (2014), *2013 Statistics for Causes of Death*, authors' translation
Unit: per 100 thousand persons

According to the 2011 Senior Survey conducted by the Korean Institute for Health and Social Affairs, respondents (all 65 years and over) chose health problems, financial difficulties, and alienation from spouse, children, or friends as the top three reasons for having suicidal thoughts.

Poor Educational Background Korea has made impressive progress in its education achievement since the Japanese Occupation and the Korean War. In 2009, 63 % of 25–34 years old completed a tertiary education – the highest rate among OECD countries (OECD 2011). These figures are impressive on their own, but they are even more impressive when compared to previous generations' education levels. For example, in 2009, 98 % of 25–34 years old completed an upper secondary education, compared to 43 % of 55–64 years old (OECD 2011).

In general, the education level for persons over 65 is quite low. According to the 2011 Senior Survey conducted by the Korean Institute for Health and Social Affairs, almost a third of the population aged 65 and over (31.6 %) were illiterate and never received formal education, while another third (35.4 %) received primary education. The gap in educational levels between generations may contribute to feelings of powerlessness in society and can be a significant barrier to better economic opportunities for elders (Ministry of Education, 2014).

31.3 The Legal Framework

The Senior Citizens' Employment Promotion Law (1991) The first formal legislation, *The Senior Citizens' Employment Promotion Law*, that addressed issues of the older population had a strong labour market focus. Its main purpose as stated in the legislation is to protect employment status of the aged group, to enhance national economic development, and to promote senior citizens' employment at positions fitting their competency and ability. Based on this law, employment promotion of the aged involves:

First hiring of older people in larger numbers:

An employer should employ those aged 55 or above for one year or longer at a required ratio by industry or higher (4 % for manufacturing 42 % for real estate business, 17 % for business support service and 7 % for others) (Ministry of Labour).

Secondly new hiring of older people:

An employer should newly hire semi-old aged (50–54 years old) or old aged people (55–64 years old) as insured workers (Ministry of Labour n.d.)

Thirdly continuous employment of older people after retirement age:

The employer of a workplace which sets retirement age limits at 57 or higher should continue to employ or re-hire within three months of retirement his/her worker who reached the retirement age after 18 months or more of employment in the said workplace (Ministry of Labour).

The law explicitly states that it is the government's responsibility to take comprehensive and effective measures to promote the employment of older workers and to ensure their stable employment. The government is expected to collect and provide employment information, develop and train senior citizens, offer guidance and supervision for businesses and support them to improve older employees' working environment.

For businesses, the law states that they should endeavour to improve aged employees' working ability, improve the working environment and facilities, provide them with appropriate job opportunities and set the official retirement age to over 60 years.

The Senior Citizen Welfare Law (1997) *The Senior Citizens' Welfare Law* in 1997 strengthened welfare policies for older people. Its stated purpose is to enact essential measures to protect seniors' health physically and emotionally and ensure a high level of quality of life. The basic notion underlying the law is to make sure seniors are respected in society, that they live a healthy and secure life, and to enable them to participate in social activities as well as economic activities.

The detailed measures included efforts to change society's view of seniors through celebration of Seniors' Day (October 2nd every year), and designating the entire month of October as Respecting Older People month. Other measures to expand social support for seniors were mostly devolved to the local level in this legislation. For example, the law assigns senior welfare counselling staff to cities, and mandates a local government subsidy for persons 65 and older who have financial difficulties. In addition, local governments are urged to broaden the chances for senior citizens' participation in community service activities, to provide employment opportunities for seniors with working ability, provide free health check-ups and health education to seniors with low-income to improve their health conditions; and lastly, to take precautions against dementia by conducting research.

The Lifelong Education Law (1999) *The Lifelong Education Law*, part of a broader *Social Education Promotion Law*, was enacted in 1999 by the Ministry of Education and Human Resources Development. This legislation was important because it made Korea the third country, following the steps of U.S.A (in 1976) and Japan (1990), to formulate legislation on lifelong education. *The Lifelong Education Law* is based on four basic principles: first, assure every citizen's equal right to

access to education; secondly, lifelong education should be on the grounds of learners' free participation and voluntary study; thirdly, lifelong education should be used as the means for enhancing civic capacity and eliminating individual prejudice; and lastly, lifelong education courses taken by individuals should receive social recognition through formal certification.

According to this law, lifelong education is defined as all forms of education, with the exception of school education, which constitutes the system of lifelong education. The lifelong education programmes that are offered in Korea are categorized as para-school education, occupational and technical education, and general or liberal education. Para-schools are excluded from the main school classification because they do not require day-long attendance in an institution. Vocational training is provided at vocational training centres under the administration of the Ministry of Labour (Ministry of Labour, 2005). General education is aimed at the general public to promote lifelong education.

Senior citizens' education largely belongs to the category of general education, which covers a broad array of content and can take place in lifelong education facilities, public libraries, museums, cultural centres, national theatres, local events, newspapers and TV campaigns (Korean Institute for Health and Social Affairs, 2005).

31.4 Older Adult Learning Programmes

Senior Citizen Schools This is arguably the most popular form of senior education in related facilities and is managed by the Korean Association of Older People. The Association has established 20 senior citizen colleges and 278 senior citizen schools. While there are some differences in the types of programmes offered by location, it still covers a relatively balanced mix of urban and rural areas.

According to its mission statement, the senior citizen school aims to “resolve conflicts arising from the competing values of East and West, old and young and to establish a new framework of cooperation fit for the modern age, and to help elders create a new life by offering knowledge and health management skills.” Generally speaking, there is no fixed curriculum but according to the requirements of the Korean Association of Older People, the courses should involve at least the following aspects: senior citizens' classroom education, senior citizens' participation in community activities, national current affairs, and fostering civic responsibilities.

Senior Citizen Colleges The senior citizen college is also managed by The Korean Association of Older People. This is supposed to be the advanced level of a senior citizen school and has more prestige in terms of scale, financial power and social recognition. Many senior citizen schools have been converted to senior citizen colleges by increasing their scale and other efforts. The College focuses on meeting the needs of senior facilities regulators and staff, and trains specialists in education for

seniors. The typical programme is three years long and upon completion, students receive a course certificate. With this certificate, they can apply to other graduate school programmes. It is estimated that around 314 senior citizen colleges exist in Korea.

Schools of Lifelong Education Affiliated with a University Lifelong education institutions affiliated with universities emerged as new forms of senior citizen education. There are 22 Schools of Lifelong Education affiliated with universities authorized by the Lifelong Learning Centre of Korean Educational Development Institute, which is run by the Ministry of Education. Its main goal is to better serve seniors by re-educating administrators and staff in related organizations and in training senior education specialists.

The curriculum can be divided into two types: (1) for senior learners and (2) for training senior education specialists. Today, there are more than 300 lifelong education institutions affiliated with a university, and 36 of them provide curriculum for senior learners. Curriculum content involves social welfare systems, health and health care, citizens and economy, citizens and politics, social change, understanding of culture and international relationships and other subjects. In addition, with Korea's transition into an ageing society and the high expectations of the "silver industry," programmes for training senior education specialists have increased dramatically.

Senior Citizens Classrooms and Senior Citizens' Welfare Centres The welfare centres for senior citizens are established under the *Senior Citizens Welfare Law*. The main purpose of these centres is to provide various counselling, health care, entertainment, liberal arts and other topics to satisfy senior participants' learning needs. In 1998, there were 80 senior citizen welfare centres, and by 2000 they had increased to 133.

In senior citizens welfare centres, there are regular and specialized curricula as parts of adult education programmes. The regular curriculum can be roughly divided into two types: (1) health care related, such as health problem diagnosis, life expectancy prolongation, health care; and (2) liberal arts and hobby related, such as modern choreography, Korean folk dance and traditional rhythmic gymnastics.

Social Welfare Centres affiliated with the Ministry of Health and Welfare The majority of programmes in the social welfare centres are related to lifelong education. The major purpose is to satisfy citizens' needs and wants to participate in social activities and to provide them with sufficient and diverse learning opportunities (Korean Institute for Health and Social Affairs 2005). But the target service groups are not limited to older citizens. They also focus on other marginalized groups such as women or disabled persons. So it is difficult to offer special aged-oriented programmes, and in general the outcomes of these senior programs are disappointing. According to recent statistics, there are 443 social welfare centres nationwide as of 2014 (Association of Social Welfare Centre). Programmes offered to older persons include: Korean characters, arithmetic, hobbies, physical exercises,

picnics and activities for respecting seniors. The programmes are mostly recreational style and focus on the development of personal interests.

Institutions Affiliated with Religious Organizations There are many religious organizations that offer older adults' education programmes, and these institutions have a two-fold purpose of enhancing the life of older persons through education as well as spreading religious messages. Most institutions are Christian, including Catholic institutions, but there are Buddhist as well. As of today, there is no representative organization or association, which makes it difficult to obtain accurate figures. However, there are estimates of about 400 senior citizen schools run by the Christian Senior Citizens' Education Association and another 100 schools conducted by the senior citizen schools under the Seoul Catholic Church.

Social Service and Other Interest Groups Social service and other non-governmental organizations are among the main hosts of the schools for senior citizens because any individual or interest groups can establish senior citizen education programmes if they wish to do so. They are largely autonomous and can make their own regulations and rules, choosing venues, hiring instructors, and designing the curriculum.

Some leaders in providing volunteer work and education services for senior citizens are the Mothers' Classrooms, the Korean Mothers' Association, the Korean Women's Association, the Korean Youth Association, the Korea Alpine Federation, the Korean National Red Cross, the Korea Boy Scout Association, the Korea Girl Scout Association, YMCA, YWCA, and the 4H Club.

31.5 Limitations and Future Directions

Korea has one of the most vibrant lifelong education communities with a wide variety of producers, and with Korea's rapid transformation in the ageing process it is certainly an interesting laboratory to test the possibilities and limits of lifelong education. We conclude this chapter by identifying the limitations of current policies and argue for continuous improvement in education for older adults.

Lack of a Coherent Institutional and Legal Framework While we acknowledge that increasing the quality of life for older adults requires a holistic approach, the current system that has devolved activities to three different actors, without any mechanisms for coordination, inhibits effective policymaking and implementation. The three actors are (1) the Bureau of Senior Citizens' Welfare in the Ministry of Health and Welfare (2) the Bureau of Lifelong Education and Human Resources Development in the Ministry of Education, and (3) the Ministry of Labour. These three actors can be linked to the three main laws that govern Korea's policy for seniors, and while in the legislative world this might make sense, in the practical world, it is clear that employment, welfare, and education need to be pursued in a

comprehensive manner. Moreover, the division of labour related to senior citizens' education among the three sectors is ambiguously defined, so in the end there is the risk of shirking responsibility or only trying to take on those tasks that are guaranteed to be a political success. We argue that there needs to be a mechanism of co-operation and co-ordination among the three actors.

Even the divisions among these three legislations are unclear. In detail, the implementation of senior citizen education is subject to both the *Lifelong Education Law* and the *Senior Citizen Welfare Law*. According to the regulations in the *Lifelong Education Law*, before establishing lifelong education facilities in the form of a school, the sponsor needs to own the appropriate facility and equipment as defined in the related presidential decree, and then apply and register in the Ministry of Education. On the other hand, according to the *Senior Citizen Welfare Law*, national or local autonomous groups should establish entertainment welfare facilities for seniors, but for other groups to build such facilities, they are required to apply to the Mayor or Chairman of the District.

Weak and Unstable Financial Support As governments are urged to become more efficient, there is the risk of shunning policies for marginalized groups in society. With a hazy institutional and legal framework for elderly policies, senior-related organizations are put in a weak and unstable position. They do not have to answer to anyone, but they also cannot demand funding from anyone. Even though senior citizens classrooms or senior welfare centres run by the Ministry of Health and Welfare can get support from the government, these funds can only cover the costs for basic operation and management. There are no earmarked funds set aside for developing practical programmes for seniors, which means they are unable to pursue their fundamental goals of developing and providing programmes that seniors need. For voluntary associations, the situation is even more dire. They receive little funding from the government, but are then put in a difficult situation where they lack the funds to provide quality services but know that their students are too poor to pay the tuition. They cannot depend on social donations either because society still has a prejudice against seniors as having little worth in a market-driven society.

One possible solution could be to use existing institutions more effectively. For example, most cities and towns have a seniors' community centre that is the most frequently used senior citizen related facility. There are about 10,000 such centres in Korea and more than one million seniors use them. These centres are a place where older people in the community can come to relax and spend time together; however, they do not provide any educational programmes. We suggest that combining the operation of these senior community centres with educational programmes can both enhance accessibility and reduce costs.

Lack of Professionalism in Personnel The Korean welfare institutions, which perform a significant educational function for senior citizens, are mostly run by social workers who do not receive adequate professional training as educators. Few have experience teaching in public schools, and even fewer have long term

experience. This puts severe limitations on the quality of teaching as it is a skill that requires much practical experience and practice. There seems to be a mismatch between the institutions that train these educators and the labour market (Ministry of Labor, 2014). For example, between 2000 and 2007, more than 1000 persons graduated from the “training programme for senior citizen education specialists” (sponsored by the Lifelong Learning Centre of Korean Educational Development Institute, the Ministry of Education), but they were not assigned to facilities for older people, as expected. The lack of professionalism is unacceptable from the learners’ point of view and the situation can exacerbate the perception that older adults are simply wasting their time in these programmes.

Failure to Meet the Needs of Senior Citizens The lack of professional staff and of a coherent organizational structure has led to a broad curriculum in these programmes. In other words, the curriculum spans an impressive range of topics; however, this means that the curriculum fails to meet the actual needs of its users who come from a variety of different educational background with different educational needs and wants. For example, the Senior Citizen School programmes described earlier mostly offer programmes on leisure and hobby activities and neglect professional or psychological needs. Another shortcoming of these programmes is the failure to acknowledge different needs in urban and rural areas, with most programmes being offered in urban areas when there is a higher concentration of older adults in rural areas. This urban-rural mismatch should be fixed with more resources going to places where there is high demand, but in the meantime governments could explore ways to use communication technology to connect more people to essential programmes. Instructors for older adults need to be trained on how to assess student needs and tailor their teaching style accordingly.

A Disconnect Between Older Adult Education Programmes and Practical Use According to the Senior Survey data (Korean Institute for Health and Social Affairs), 57.9 % of the population of 55–79 years old want to continue to work. The leading motivations were to cover living expenses (34.3 %), to get happiness and satisfaction from work (17.4 %), to maintain health (1.6 %) and to contribute to the society (1.1 %).

Thus, an economic motivator seems to be the strongest reason for senior citizens’ desire to work. As previously mentioned, financial problems were one of the top three reasons for suicidal thoughts among senior citizens. This indicates that older adults’ participation in educational programmes, such as the Senior Citizen College, is not simply for entertainment and recreation anymore; they want to gain new skills so that they will be more successful in finding a desirable job in the labour market. However, most educational programmes are still entertainment-oriented, focus on enriching older people’s later life in a casual sense, and seldom involve employment skill training. Senior citizens should no longer be viewed and treated as outsiders and educational programmes must look for ways to re-connect retirees to both the labour market and society.

31.6 Conclusion

In sum, the demographic forces and socio-cultural changes are increasing demands for lifelong education. While Korea has taken some impressive strides to provide appropriate education programmes, there is still room for improvement. Attention should be focused on extending equal learning opportunities to all senior citizens regardless of former educational background, financial status, social position, residence areas and other aspects, so that the overall education quality of older people can be improved. Raising the educational status of senior citizens can mitigate younger generation's discrimination and prejudice towards the older generation, and it can also awaken older people's consciousness and restore their status and role in the family, together with Korean society. Moreover, providing more practical programmes, such as training for employment skills, instead of mere recreation-oriented programmes, can be a win-win strategy (Kee 2007) that answers the needs of senior citizens as well as society.

References

- Association of Social Welfare Center (KASWC). (2014). Nationwide Social Welfare Center Total Number. Retrieved March 14, 2014, from the World Wide Web: <http://www.kaswc.or.kr/>
- Kee, Y. (2007). *The practice of older adult education in Korea*. Seoul: Hakgisa.
- Korean Institute for Health and Social Affairs. (2005). Senior survey.
- Korean Institute for Health and Social Affairs. (2011). Senior survey.
- Korea Statistics (KOSTAT). (2014). 2013 Statistics for causes of death. . Retrieved September 28, 2014, from the World Wide Web: <http://kostat.go.kr>
- Ministry of Education (MOE). (2014). *The Lifelong Education Law*. Retrieved March 14, 2014, from the World Wide Web: <http://moe.go.kr/>
- Ministry of Health and Welfare (MOHW) (2014). *The Senior Citizen Welfare Law*. Retrieved March 14, 2014, from the World Wide Web: <http://mohw.go.kr/>
- Ministry of Labor (MOLAB). (2014). *The Senior Citizen Employment Promotion Law*. Retrieved March 14, 2014, form the World Wide Web: <http://molab.go.kr/>
- National Statistical Office (NSO). (2012). *Future population forecast*. Retrieved March 14, 2014, from the World Wide Web: <http://www.nso.go.kr>
- OECD. (2011). *Education at a Glance 2011: OECD Indicators*. OECD Publishing. <http://dx.doi.org/10.1787/eag-2011-en>

Chapter 32

Russian Federation

Olga Agapova

32.1 Development of Older Adults' Learning and Historical Formations

Education of older people is mostly considered as a component of adult education. Adult Education in the Russian Federation has passed several stages. The main task, which fulfilled the adult education with early twentieth century up to the beginning of the Second World War, was the elimination of illiteracy. Later, up to the end of the 1970s, the focus of adult education was mainly on the professional training and retraining adult population. This is the period of fast development of evening schools, so called 'schools for working youth' and extramural learning. Later, in the 1980s, the emphasis shifted toward the cultural (or 'common') development of the population. That time was the period of andragogy recognition: theory and methodology adult learning was identified as a science. The current stage of the development adult education, which has lasted for almost two decades, is closely linked to the transformation processes taking place in the society, with the economic and political changes, with adopting new values. The modern stage should be defined as an attempt to consider adult education as an effective way to adapt adult's needs, wishes and possibilities to rapidly changing conditions of life, as well as the opportunity to learn how to respond flexibly to these changes (Vershlovskiy 2008).

Each historical period is dominated by suitable ideology and determined the content, directions, values and forms of education. In the Soviet period (1950s – early 1970s) an entire system of 'ideological educational work' was established, attracting urban and rural population of different ages to the popular universities with history, culture, economy, medicine, agriculture faculties. In 1947 the organization

O. Agapova (✉)
St.Petersburg, Russia
e-mail: oagapova@mail.ru

for the dissemination of political and scientific knowledge was established, later it was renamed into the All Russian Public Organization Society known as *Znanie* (meaning knowledge) (see <http://www.znanie.org/index.html>).

By the early 1990s *Znanie* has ceased to be ideological 'extension' to the communist party and has become the independent non-governmental network organization, which to-date has been kept in more than 60 regions of the Russian Federation. In 1996 supported by the Institute for international cooperation of the German Adult Education Association (*dvv international*) the idea of creating 'The Third Age University' was implemented (see <http://www.dvv-international.de>). In fact, this new institution was a copy of classic 'university' structure. Created in framework *Znanie* in different regions, it has been met with a great interest by an older adult audience, on the one hand, and has not placed reliance in it, on the other hand. These first years of older adult learning practice showed the key problem: there was few staff, who could organize educational work at the professional level. Most of those who started these activities came from the different educational cultural or social institutions and have not have any idea of methodology of learning. Later with the support of *dvv-international* the study tour and series of trainings in Europe incl. Germany were organised. Thus, for the first time Russian educators have had the opportunity to meet the European experience in older adult learning. At the same time a broad dialog regarding effectiveness and potentials older people education in Russian Federation has been started (Agapova 2000).

An important step and major impulse to the development educational work with older adults became the international project 'The empowerment participation of older persons in the social and political processes of democratic development of Russia' (2002–2004), supported by the delegation of the European Union. The project's aim is to update and to use the life experience and activities older people for the development of civic community and development self-reliance, activeness and responsibility older adults in the search for issues related to the improvement of their life conditions, the promotion of dialog with other generations. In the frames of the project a series of publications presenting Russian and European experience were produced and distributed the different forms of educational activities.

Each of the five project partners (Yaroslavl, Chelyabinsk, Novosibirsk, Moscow, Orel) implemented educational activities for target groups, discussed topics, related to the later life to study the social experience and to include older generations in democratic social processes and in an information space. The project has clearly demonstrated effectiveness of trainings: being active creative responsible students, older people can achieve really good results and positive changes in their lives. At the local level educational mini-communities and study circles have been created. However, the first experiences in older educational practice have faced two biggest challenges: first, the lack of professional staff, who is able to organize and to conduct activities and trainings for older adults, and secondly, stereotypes about the role and place older people in society development.

The next decade practical educational work with older people was supplemented by training professionals in the regions. Supported by *dvv-international*, Russian partners organized seminars and conferences, inviting local authorities and state

institutions to participate more actively in the dialogue about role of older adult education in the society. The largest event was the Forum 'Elderly People and Education' (Orel, 2005), where first the 'Concept of Geragogy' was presented and discussed. This paper describes phenomenon education in old age, goals, objectives and mechanisms for the implementation in the Russian Federation. The main outcome of this phase is that more than 250 educators, who have been trained professionally and able to work with the older generation, know how to use innovative active methods of learning. During this period several handbooks and articles appeared, presenting the best practice and programmes, methodological and organizational issues, related to education older people as well as sociological and psychological studies with the focus on education older people. At the same time near NGOs in the sphere of education older entered public and state organizations (social service centres, public and private universities, cultural institutions, libraries, museums). The present stage of the development education older could be characterized by the following features:

- The state governmental programmes via local authorities and the relevant agencies (social centres), educational institutions, and non-profit organizations assume responsibility for the computer literacy trainings for older people;
- With the support of international organisations (e.g. the German Foundation 'Memory, responsibility, the future') the so-called biographical education in different forms and with the involvement of representatives of other generations develops quite successfully (Agapova 2008);
- New distant forms of learning and information support are getting implemented and accepted by the target audience;
- Internet with all its capabilities is becoming part of the lives of older persons and welfare; even 10 years ago this was hardly possible;
- As a result and partly a consequence of learning, self-help movement with different forms of geronto-volunteering, self-organizations, study circles and so on develop quite actively;
- Older adult oriented re-training and skills development programmes in public employment services.

32.2 Contributors to the Growth and Development of Older Adult Learning

The field of older adult education has attracted different people of different ages and geographical location. Almost all of them recognise that the scope of the activities gave them a lot for their professional skills. Of course, the article frame does not make it possible to enumerate all of these people, as well as older multipliers involved. Anyway some of those who indeed have changed the *quality* of older adult education in Russia should be mentioned.

All-Russian Public Organization Society Znanie (Central Board Moscow and regions: Orel, Severodvinsk, Yaroslavl, Krasnoyarsk, Kursk, Chelyabinsk, Ufa, etc.). Offering courses on a commercial basis, producing on-line magazine for adult educators *New Knowledge*, *Znanie* operates in 65 regions RF. The 'Third Age' programmes and social activities for older adults attract the interest of the target audience and improve social prestige of the organization. Each regional organization chooses its strategy, the content and topics, local partners and methods of work. The most noticeable projects that demonstrated innovation and excellence in the development related to the biographical learning (Orel, Yaroslavl, Severodvinsk), the development volunteer movement (Kursk), the development creativity older (Chelyabinsk), information and computer technologies in education older (Stavropol), intergenerational dialogue (Orel), the protection of the rights and the interests of older persons (Nizhni Tagil, Kamensk-Uralsk, Altai region).

Siberian Association Adult Education (executive director Oksana Larionova, Krasnoyarsk). Created in 2000, in the framework of the 'Center of active methods in adult education' the association has carried out a great deal of work on the training of specialists in the work with adults, including the practical development interactive technology and methods of work. In Krasnoyarsk has successfully established Regional University of older people located at the Central Regional library, created platform for the trainings in the small towns.

Centre of Women's Initiatives (projects coordinator Ludmila Smirnova, Tosno, Leningrad region). This small organisation is established by a group of active women to provide support to socially unprotected women in poor living conditions. Since 1997 the Centre organised trainings for unemployed women, people with disabilities, migrants, and prisoners. If earlier the main theme has been linked to the traditional culture and hand-crafts, nowadays they are more involved in older adult learning programmes, training multipliers and volunteers from the number of older women, which enclose it in their villages and towns can independently organize learning clubs, self-organized groups with the focus on historical topics, the groups for psychological, information and juristic assistance.

Centre of Social Adaptation and Retraining Programmes (project coordinator Anna Gordienko, Novosibirsk). This centre one of the *dvv- international* partners conducted educational work for and with older people. The team of active pensioners created have become the leaders and experts, who themselves initiated educational programmes for the people of the same age, such as, for instance, 'University management of personal finances', 'School of Local self-administration' and others. This project is one of few examples of productive long-term dialog education older people and the local district administration.

Third Age School (Svetlana Chernysheva, St. Petersburg). This socio-educational centre for older people has been established in 2004 together with local social centre. From the very beginning the institution uses the model and values of traditional Danish folk schools. The trainings for older adults are focused on the practical result. Each learning course is to be done with the social project elaborated by the

whole group. Regardless of the course, all students have to participate in the basic obligatory courses 'Foundations of Democracy' and 'Philosophy of Age'. Knowledge and experiences gained are not only expand the vision of democratic values, but also develop responsibility, self-identity, disclose the prospects for future practical activities, generate the positive attitudes. In addition to the traditional courses older people get access to the new activities and professions as photography, journalism, stage direction, which subsequently helps older participants to express themselves and describe their lives, to participate in creative contests and projects.

Resource Training High-Technology Center (ORT-SPB) (year of opening 1995, director: Marina Sorokina) (see <http://www.ort.spb.ru/>). The ORT-SPB's goal is to provide high quality computer-based trainings, incl. Skype, Internet, digital photography, etc. Older people can participate in projects, to enable the practice to use the acquired knowledge in the field of IT -technologies. An example is the project 'I am from the past build a bridge: electronic memoirs the victims of totalitarian regimes', supported by an international charity programme 'Meeting point: Dialog' (www.mestovstrechi.info), carried out by CAF Russia (www.cafrussia.ru) with support from the Foundation 'Remembrance, Responsibility and Future' (www.stiftung-nationalsocialism.de). Its goal is to keep memories, documents, photos and other materials older victims of National Socialism and Stalinism, those who stayed in blockade Leningrad during Second World War. The organisation claims the leading position in the computer education older people, they are ready to share the experiences and best practice with colleagues from the other organizations. In this regard, in recent years a separate focus of their activities was to increase training of educators, who are working at the state social centres producing computer courses for older persons.

Progress in older adult education also became possible due the work of people who promoted this field in different regions of the Russian Federation. These include:

Tatiana Kononygina (Orel) – the author of the concept Gerogogy in Russia, the author of a number of scientific and practical papers, handbooks (*Talk-cafe*, *Storytelling-therapy*, etc.), the author of the first thesis on older adult education in Russia. Her contribution to the development of older adult learning cannot be over-emphasised; thanks to her enthusiasm, dedication, conviction of the need for education older 15 years running the University's golden age and resource centre for older adult education, and her native city Orel is now recognised as Russian 'capital of older adult education'.

Grigoriy Klyucharev (Moscow), a scholar sociologist, who considered education of older people in the context of social and economic processes that are taking place in the society. Using sociological research methods he clearly shows the importance of the institute of lifelong learning for the development of society as a whole (Klyucharev 2008).

Sergey Kaznacheev (Novosibirsk) who throughout his writings, researches, public lectures proves the positive impact of learning in the later age on the state of health,

mental and emotional status older person. His work also demonstrates how the initiation to the new knowledge hinders the processes of aging in human body.

Natalia Ermak (Rostov-on-Don) coordinates various creative activities that impact the quality of life of older persons. Being an artist practitioner, she leads an art studio for pensioners (Ermak 2007).

Eduard Karyuchin (Moscow), head of the Educational Fund 'The Good Affair' which provides assistance to older people through the coalition 'Right of Older'. The coalition deals with the rights of older persons by advocacy and escort older people in difficult situations, by implementation of regional projects for older people.

32.3 Contemporary Forms of Older Adult Learning

Nowadays, older adult education is presented by various institutions, most especially: (i) scientific institutions, which are involved in the research programmes on various aspects of society life, including the education of older adults (medicine, sociology, gerontology, history, etc.); (ii) adult education institutions, dealing with different types of non-formal education (community-based organisations, women's associations); (iii) state institutions (social centres, libraries, museums, cultural centres); and (iv) centres adult and/or older education, organised by the state institutions (universities, colleges, health education centres, etc.).

The existing palette of educational activities for adults and older adults in the Russian Federation seems *not* be described as a *system* today, as most of these institutions exist and work separately. The present state of the older education is to be determined, in our point of view, by internal contradictions, reflecting more general social problems, in particular. Indeed, one can say without exaggeration that the theory of older education in the past decade has made a breakthrough: the fundamental researches were conducted, scientific and terminological apparatus has been identified, the position of the older learner is defined; general needs different categories older population in the training are presented in the publications, target audience is classified according to the educational inquiry, which allows to define adequate training approaches. Defined learning objectives and mechanisms are being developed. It may be observed, that theoretical and methodological problems in adult education are currently in the stage of a sufficiently stable and sustained development. However, creating a framework for older adult education, science has been often far from the practice of learning, from the activities of the different-profiled institutions. The science progress simply do not reach practice, or constitute such level of abstraction that, in general, they are hardly useful or need the substantial 'adaptation' for educators. Educational institutions are delivered in a situation of real and tough competition which determines the content and frames of

educational services. The organizations first have to satisfy the conditions/rules/needs of those who pay (sponsors), and only after – to meet the needs of potential older students.

In recent years, the initiatives related to older learning actively develop in all regions of the Russian Federation. Local projects, initiatives, ideas that have been developed by working groups and teams stimulate a dialog with social and cultural spheres, as well as with local authorities, including them in joint projects. It helps to receive financial support for learning activities. A crucial resource, determining today's success promotion of any field of knowledge, is an information support, which in the case of older adult education is clearly insufficient. Adult and older adult education virtually is not presented in mass media. If the regional media are turning to the topic, central television channels extremely rare discuss benefits and advantages of older adult education with authoritative or well-known persons.

Development of adult education in Russia presents gaps in legal and regulatory frameworks. In the laws of the Russian Federation On education, On the postgraduate professional education is missing the very notion of adult education. The draft Law 'On education' in the article on the supplementary adult education is seen in the main only additional professional education of adults. All existing forms of adult learning belong to the different command, separated from each other and are not integrated into a common public policy, relevant managerial and coordinating structures, theoretical and scientific and methodological principles of learning.

32.4 Key Concepts and/or Theoretical Perspectives

Development of older adult education in the Russian Federation is based on the international experience and the key international Acts and instruments, such as the *Madrid International Plan of Action on Ageing* and the *Memorandum of Adult Education*. The fundamental human right to learn throughout life is the basic principle in developing conceptual approaches for scholars and practitioners. The key humanist ideas put older learners in the centre of the learning process. In practice that means the following principles: orientation on the target group needs and resources; safety and comfort in the environment and in the process; dialogue as a central tool in adult learning; training activities, in practice (learning by doing) with follow-up reflection; respect to participants; impact on the consciousness, emotions, paying attention to the experience and giving an ability to enjoy training process; through activity and openness engage learners in what they are exploring; the results and evaluation of the training are based on self-evaluation the outcomes of the training; and focus on changing stereotypes of old age and old people'.

The key document is the concept of the 'geronto-education' (Kononygina 2006) The concept takes into account the provisions of the Russian Constitution, the law 'On the right to education' in the Russian Federation, 'National Education Doctrine'

is based on the projects of the Federal Law on Education, 'Memorandum of Lifelong Learning' produced by European Union, as well as documents, adopted by the international organizations, in order to enhance educational space for older citizens, and requires the participation target group educational programmes and projects in order to meet their learning needs, full development of citizens. The concept identifies factors that hinder the system development, namely: legal and regulatory framework does not exist; there is lack of trainings and methodical literature, there is no system training for educators; mechanisms for social participation older people in educational processes are not developed, there are no specific technologies and techniques, specific to older education.

32.5 State Assistance and the Development of Opportunities for Older Adult Education

At the level of social policy, participation of older persons in the civil society is highly encouraged in Russia. The pensioners have the right to participate in the management of the state affairs, have the right to elect and to be elected to public authorities and bodies of local government. The older citizens are traditionally considered to be active elections participants. Public and political activity older citizens legally are not limited. Older people may enter political parties, organize their own political movements and associations, they are involved in social activities, have been actively involved in education and learning programmes. At the federal and regional level are public associations of older people, formed, as a rule, on the base of the legally recognized social status (for example, Second World War veteran). Recognizing the inability to discrimination on the labor market, the legislation restricts public support of older citizens in the field of employment. The retirement age makes impossible to use the training and retraining at the expense of employer, eliminates the possibility of obtaining status of 'unemployed person', which means no possibility to use state service for job searching and receiving unemployment compensation. Participation in programmes secondary professional education older persons may with their own means or by means of an employer. In the laws of the RF about Education, About Postgraduate Professional Education there is no any notion of adult or older adult education. Partly these legislative problems are offset by regional state programmes 'Senior Generation', which are designed to ensure that improvement of the quality of life of older people and are to be implemented at the regional/local level. The analysis shows that mostly they focus on social services (supplement to the pension, recreational activities, and health services). In recent years, with the support of mentioned programme 'Senior Generation' social centres for pensioners have organized computer courses, hand crafts programmes and recreational activities. In some regions older people receive free legal assistance and consultations, psychological support.

32.6 Key Issues and Problems Facing Older Adult Educators

The need for training of adults' educators is quite clear for educational community. In 1994 the Order of Ministry of higher education has approved the specialty '031400 – Adult Teaching'. Respectively, there were developed state educational standards, requirements to the content and levels of training graduates. In 2000, specialty 'adult teaching' was withdrawn from the list of the bachelor and master's degree programmes. Thus, in the Russian Federation there is no opportunity to get training in specialty 'adult education' at the level of higher education. However, in some universities and state educational agencies – such as the Academy of Postgraduate Education (St. Petersburg) – the chairs of Andragogy are opened. Their aim is to improve andragogic competence, which means, to develop skills and abilities in the field of education, rehabilitation, information and orientation of the work with the adults of different ages. The development of competence is understood as *a willingness* to implement skills on the level of the individual activities in practice, to implement them in the professional activities. The chair of Andragogy Academy of Postgraduate Education (St. Petersburg) has been made an attempt to synthesise training experiences in various publications: *The working book of andragogy* (1998), *Andragogy in the postgraduate education* (2007), and *Continuing education* (2008).

The special preparation for the educational work in the field of aging is carried out in the form of a trainings, seminars, interactive workshops, where practical skills are developed through interactive exercises and games, practical job, etc. This consolidation-oriented short term training, as a rule, gives students invaluable experience (interaction, communication, skills to work with the group), but the theoretical basis andragogy and geragogy, as a rule, remain outside training. In addition, this could be described as “one-off” activity: nobody knows, when participant will have a chance to participate in the next training. In a systematic consistent long-term basis there is no educational programme so far. The establishment of a system for training and retraining professionals, as well as multipliers on the basis of continued exchange of experience, synthesis practices, research data and best practices in and outside the country is ready to assume the interregional resource centre geronto-education in Orel, however, and it could not function on the permanent basis without a stable funding and state support.

32.7 A Case Study

In 1997, on the initiative of then 'young' head of the *Znanie* organization Tatiana Kononygina a 'People's University's of Golden Age' was established. The quite new for that time idea to train older people has been supported by *dvv-international*. The most important and difficult task was to find people who would have supported

the idea. The first courses have helped older people to orient themselves in the information space, to get the new knowledge of law, economy, household. Training plan and training topics have been framed according to the wishes and interests of the students. As a result quite impressive broad and diverse palette of courses and educational programmes has been elaborated. The older students have learned among others church history, architecture, hand crafts and painting, the economy and manage their own finances, as well as horticultural secrets, as these activities are very popular in this region. Getting more and more popular for last almost 15 years thousands of people senior ages, as well as more young generations (so called 'young pensioners') have participated in the University programmes. In addition, University gives the older people an opportunity to share their life and professional experiences. For this purpose new educational programmes have been implemented: 'The School of Joy and Well-being', 'Elderly people in the Russian Federation', 'The Older Persons Rights', 'The Healthy Way of Life'. On the regular basis the active older people organize "Talking café" with very popular topics: 'The History my childhood', 'My joy in life', 'My first love', 'The story of one Photo'. University programme includes training activities on the Chinese breathing gymnastics, the rational nutrition, memory trainings, Nordic walking and dance. The older volunteers produce a magazine for the older 'Golden Autumn'. Annually more than 6,000 people participate in the trainings and educational activities (Orel population: 320,000). *Znanie* cooperates actively with high schools, universities and colleges, located in Orel.

Znanie Orel shares their knowledge with the colleagues in the neighbor regions and almost all over Russia. Started in 2000 a resource centre of Geronto-education was established with the aim to gather the best experiences from different regions Russia, via trainings and courses to improve professional skill of practitioners and experts in Geragogy. In the form of short-term seminars participants have an access to the knowledge and new skills. At the same time, regardless the subject, trainings in the educational work with older would require the development of a number of conceptual knowledge, in particular: the older person as a specific target group in the process of education; the real deficits and potential of older in the educational process; the establishment of the interactive teaching models; the acquisition of work experience with stereotypes, regarding age; and awareness of motivation training activities in old age and how to maintain it. Geragogical trainings, regardless of age, has been developing the professional 'taste' to the new, the desire to look for and to use new inspiring techniques and methods of work with older adults. It helps to create a professional 'Geragogical' community and there is hope that in the future, this will have a positive impact on the quality of life of older people.

32.8 The Future for Older Adult Education in the Russian Federation

One of the most significant problems on the way to the establishment of a system is in overcoming stereotypes to non-formal education. The undervaluing of resources non-formal education leads to social issues such as isolation older people, growth negative sentiments against the state and the government, pessimism and social tension, on the one hand, and the lack of development *Culture* of education in the society in the whole. Therefore, a priority of the society and the social sphere and the organizations is the recognition of all forms adult education as an independent and equal part of the education system. An essential element in the system of life-long learning is an additional professional education in the form of seminars, trainings, club meetings aside from professional activities. This form can actively grow only when conditions for the establishment of an appropriate legal framework will take place and all forms of education, including non-formal, which supports and promotes education of citizens, regardless of their age, social status, ethnic origin, nationality, religion, economic status, location will be recognised. The adoption of the Law on adult education at the federal and local levels will help to address the full range of tasks associated with providing broad color palette educational services for the different segments of the population, including older citizens.

Despite the efforts of some Russian and foreign organizations, up to now, there is no stable training system for educators working with older adults, which reduces the effectiveness of the process teaching older students, and the process of education is perceived by the mass consciousness as an optional, secondary. At the same time adults educators discuss new requirements to the profession geragogy. The development and implementation in the system of higher and secondary education practice-oriented training programmes for specialists to work with older adults, based on the humanistic values, taking into account the latest findings of geragogy, didactics and learning methodologies older, it seems a significant task for the nearest future. In different regions, geragogy is intensively developed, primarily as a practice area and sciences (sociology, psychology, andragogy) at the crossroads. Some projects have got the endorsement and support from the authorities and state social services. It was evident that the implementation of a major social project is hardly possible only within one country, by the efforts of only one national organizations. To achieve social stability and the development of democratic values in the life of society a key role still belongs to international cooperation and support from donor organizations. Long term cooperation in the future will admit to implement the innovative educational projects for older adults.

References

- Agapova, O. V. (2000). *Education of elderly adults: Perspectives for society and person*. Moscow: Znanie.
- Agapova, O. V. (2008). Biographical approach in educational activities with adults [Biographicheskiy podchod v obrazovatelnoy rabote so vzroslymi]. In G. A. Klyucharev (Ed.), *Continuing education in political and economical contexts* (pp. 368–382). Moscow: IS RAN.
- Ermak, N. A. (2007). *Pedagogical support of older adults in gerontoeducation* [Pedagogicheskaya podderjka pojilych ljudey v gerontoobrazovanii]. Rostov-on-Don: IPO PI UFU.
- Klyucharev, G. A. (2008). Continuing education: Problem of practice legitimating (Dopolnitelnoye obrazovanie – problema legitimazii praktiki). In *Continuing education in political and economical contexts* (pp. 108–119). Moscow: IS RAN.
- Kononygina, T. M. (2006). *Geragogy: Handbook for elderly educators* [Gerogogica: Posobie dlya tech, kto zanimaetsa obrazovaniem pojilych]. Orel: Krasnaya Stroka.
- Vershlovskiy, S. G. (2008) *Continuing education: Historical and theoretical analyses of the phenomena* [Nepreryvnoe obrazovanie: istoriko-teoreticheskiy analiz phenomena]. St. Petersburg: SPbAPPO.

Chapter 33

Singapore

Kalyani K. Mehta

The field of older adult education has only recently been introduced in Singapore. Up until the year 2000, the focus had been on adult education, that is, for those above 21 years who had missed out on receiving a basic education, and who wished to improve their economic prospects by studying further. There is no legislation on older adult education, unlike in some developed nations. It can be said that the underlying reason for promotion of adult education has been largely for improvement of career and job prospects. Singapore, being an Asian country, with more than 80 % of its population belonging to the Chinese ethnic community, has a pragmatic cultural base. This permeates most of the national development strategies, and government policies.

When Singapore achieved its independence from Britain in 1963, the large majority of the adult population did not have a tertiary education. However, over the next decade the situation improved. There was an Adult Education Board in the 1960s which was the leading organization, under the Ministry of Education, offering courses such as English language development, Basic Accounting and Basic Economics. However, it did not evolve with the changing needs of the adult population, and so it was merged with the Institute of Technical Education (ITE).

The process of industrialization and modernization jump-started the tiny island to survive in the world with a population just over three million. The government leaders have done an excellent job of re-inventing Singapore with the contemporary times, and it is often called an ‘economic miracle’ by scholars because it has demonstrated that a small nation can evolve from third to a first nation status. Singapore’s history as a British colony gave it an advantage in terms of the educational policies and infrastructure that the British left behind as a legacy. However, due to economic imperatives and costs of education, not all young people managed to complete

K.K. Mehta (✉)

Gerontology Programme, SIM University, Singapore, Singapore

e-mail: kalyani@unisim.edu.sg

school. Thus, adult education has always been in demand in Singapore. Government subsidies have been provided for recognized courses (e.g. diploma or degree courses). Employers have also provided grants to promising employees to further their education in order to increase their productivity and output that adds value to their jobs.

A major milestone in the adult education scene was the development of the Continuing Education and Training (CET) Masterplan that was launched by the Ministry of Manpower in 2008. Incidentally, this was launched after the demographic profile of the population was identified to be ageing fast. Today, Singapore is one of the fastest ageing societies in South East Asia. In 2013, 11 % of Singapore's population was above age 65 years, and this will increase to 19 % in 2030 (Teo et al. 2006, p. 16). The baby boomer population is forming the bulge in the middle of the pyramid of Singapore's population, with a median age of 40.6 years reported in 2010 (Mehta and Thang 2012, p. 29). In 2011, a new legislation called the Retirement and Re-employment Act was passed in Parliament that required all employers to offer re-employment to seniors who reached the official retirement age of 62 years. The extended contract could be renewed until 65 years. This is a strategy that stands in contrast to some countries that have increased the retirement age in order to address the challenges of a shrinking workforce. The consequence is that agencies such as the Workforce Development Agency (WDA) have had to rapidly increase the courses offered in order to upgrade the knowledge and skills of the senior workforce.

33.1 From Past to Present Status

The present discussion uses the distinction made by Jarvis, 1985 (cited by Findsen and Formosa 2011, pp. 22–24) between informal, non-formal and formal learning.

During the period of Singapore's history from 1960s to about the 1980s, Singapore was grappling with economic challenges and to be exact, national issues of survival. Higher education opportunities for adults were very limited – hence, it was informal learning that was most prevalent. Only the privileged class could afford higher education such as a university education. The middle and lower income groups were generally occupied with meeting the expenses of their families, and therefore even teenagers had to join the workforce so that their younger siblings' studies could be financed. Scholarships and bursaries were limited and only outstanding students were successful in clinching them.

Adult education came on the scene in the 1960s with the establishment of the Adult Education Board (Lembaga Gerakan Pelajaran Dewasa) and evening classes were introduced so that aspiring adults could work during the daytime and educate themselves simultaneously. Vocational certificates were offered within the specialized sectors but these were in specialized skills – for example, welding or carpentry.

From about 1980, diplomas and advance diplomas were offered by statutory bodies such as the People's Association and the Council of Social Service (now known as the National Council of Social Service). These were usually available to

those who had an “A” level Cambridge certificate. Counselling and social work diploma courses appeared on the scene to train professionals to tackle the emerging social problems.

From about the 1990s private providers became more popular and were seen as more attractive, as a new cohort of ambitious adults came on the national scene. However, older adult education was still under-developed. There was no critical mass to warrant the supply of learning channels for older adult education. However, non-formal learning opportunities started to surface in the form of arts such as the Nanyang Academy of Fine Arts (NAFA) which was established in 1938. There were older adults who started to seek learning opportunities in talent areas such as calligraphy, brush painting, sculpting and pottery. Usually certificates were awarded to the successful participants of such courses.

Community centres, funded by the government through the statutory body, the People’s Association, became the hub of adult learning activities as they were located in the heartlands, or public housing estates, and were easily accessible. In effect, “learning communities” were born following the birth of community centres in Singapore. There are more than 100 community centres/clubs in Singapore today offering short courses in self-development. However, older adults form only a small percentage of the patrons in these courses.

The turn of the century can be benchmarked as the time when older adult learning opportunities really became available to the public and accessible to older adults. The following list summarises some of the well-known opportunities for non-formal and formal education in Singapore currently. The list may not be exhaustive, but it includes the major players on the landscape of older adult education:

- Young At Heart Community College (YAH! Community College)
- Fei Yue Active Ageing Academy and Golden Age College
- The Council for 3rd Age (C3A)
- Senior Citizen Clubs
- Lee Community College
- NUS Extension College
- Institute for Adult Learning (IAL)
- Retired Senior Volunteer Programme (RSVP)
- Centre for Seniors
- Graduate courses offered by the four major Singapore universities (National University of Singapore, Nanyang Technological University, Singapore Management University and Singapore Institute of Management University) and private universities such as James Cook, Swinbourne, Monash, Warwick, and so on.

33.2 The Case of Montfort Care

In this case study of one organization (i.e. Montfort Care), two of their programmes are examined, the Good Life Program and the YOUNG at Heart (YAH!) Community College. Montfort Care is a network of social agencies committed to strengthening families.

Under Montfort Care, the Marine Parade Family Service Centre is a one-stop neighbourhood centre that caters to the needs of families living in the geographical constituency of Marine Parade. As many seniors live in the constituency, the Marine Parade FSC has initiated two innovative, indigenous models.

The Good Life @ Southeast Program started in 2001, in collaboration with the Southeast Community Development Council and Citizens Consultative Committee. The aim of the centre is to promote productive ageing and enhance physical and mental health of its members, who are above the age of 55 years. The programmes vary from recreational to social to creative arts. According to Mehta and Cheang (2008, p. 220), “The key aspects of the centre include (a) seniors for seniors concept (b) a strong social support network and (c) promote lifelong learning among older adults”. Additionally, these authors found that the regular members’ life satisfaction and happiness was increased after they joined the GoodLife @ Southeast Program. The six influential factors were identified as (i) spending of constructive time, (ii) exposure to the outside world, (iii) generation of new skills and knowledge, (iv) keeping mentally and physically fit, (v) caring staff at the centre, and (vi) a positive group identity.

YAH! Community College was started in 2004 by the Marine Parade Family Service Centre, and it is funded by the Council for the Third Age (C3A). The “transformational” concept was utilized in the formulation of the plan for the College. Mezirow (1991) argues that a learning theory that centres on critical interpretation of people’s meaning perspectives could be a key component in the philosophy of adult learning.

The initiator of the Community College is a professional social worker, who applied some social group work principles in the implementation of modules. Some of these principles are self-determination, cohesion, bonding, and group development as a context for individual development. Within the modules of the Programme, group dynamics are utilized for the transformation of perspectives of adults. It is a four month long structured programme to release the potential of seniors in Singapore. It is conducted in Mandarin and to date more than a thousand members have graduated.

YAH! VISION

Fostering a society where seniors live full, active and meaningful lives.

YAH! MISSION

To make active ageing a way of life.

After about five successful years, the pioneers of YAH! College began to innovate and expand with new ideas. Learning networks, learning hives and satellites were created to have a multiplier effect on the older segments of the Singaporean population. Graduates of the College were tapped as volunteers to inspire the new students, as well as to continue their relationships with one another. However, the organizers realized over time that they had not factored in the individualistic tendencies of the volunteers who preferred focussing on self-improvement over community outreach.

The Yah Community College underwent a process of transformation when the Learning Hives were closed down, and a clearer focus was obtained when the leaders decided to adopt a “mindset-focussed model”. Going forward, the [Yah! Community College](#) leaders aimed to empower seniors and their families. The shift in focus resulted in a three pronged approach: (i) personal transformation; (ii) social action; (iii) development of a social movement.

In line with the new shift in emphasis, the graduates could apply to become ‘ambassadors’ to engage with public education, pointing out the dangers of gambling especially at casinos. Management of volunteers is a challenge as volunteers have their own personalities and needs. The Yah! Community College is now focused on social action and societal change through a social movement process. A social movement in this context refers to social-cum-cultural group/collective action that aims to improve the society (Mayo 2005).

33.3 The Current Status of Older Adult Learning

The core of the older adult learning portfolio has shifted from the Ministry of Education to the Ministry of Manpower with the launch of the Continuous Education and Training Masterplan. The fading away of the term ‘adult education’ and its substitution by the term ‘lifelong learning’ has meant a shift of paradigm in Singapore (as discussed by Findsen and Formosa 2011, p. 34). The term *adult education* has become almost obsolete and as *the learning economy* has emerged in full force, the importance of lifelong learning in the larger schema of an ageing workforce has surged into the parlance of politicians and the media. The CET Masterplan envisaged an [Institute of Adult Learning](#) (IAL) to develop the capability of adult educators. The aim of the CET Masterplan was to prepare the Singaporean workforce and industry for meeting the economic needs of the future, and the needs of the emerging and growth industries. A funding commitment was made by the government for private and public providers to provide high quality training to increase the capabilities of the future workforce.

It is commendable that the government had the foresight and the courage to embark on such a major enterprise given that in 2008 Singapore was facing the prospect of a recession. CET centres and campuses were outlined in the Masterplan, as hubs for providers, employees and employers to meet and synergise. The Workforce Development Agency (WDA), under the rubric of the Ministry of Manpower, was identified as the main implementation arm and it was tasked to develop competency benchmarks for all the important social and economic sectors. The WDA would confer onto the National CET Institute pinnacle status on centres that excelled in their respective Workforce Skills Qualification sector. The Singapore Workforce Skills Qualifications (WSQ) system was launched in 2005 by the Ministry of Manpower. It is executed by the [Workforce Development Agency](#), and as of 2010, 30 WSQ frameworks have been developed.

The centres and campuses are constructed keeping in mind the needs of adult learners. The “MCYS Survey on the Needs of Seniors in Singapore” (Tan 2008) highlighted the difference in needs of the younger adult learners (40–54 years) and the older ones (65–74 years). The survey found that younger adults were more interested in job/career-related courses while the older age bands preferred non-job/career-related courses. Regarding their learning styles, the younger learners (aged 40–54) liked to learn in a group setting where peer learning takes place while the older learners (aged 65–74) preferred experiential methods and auditory instruction. A key finding was that participation in learning was very much related to educational attainment. “If so, we may extrapolate that future senior citizens and residents in all three age bands could be expected to be inclined towards participation in learning” (Tan 2008, p. 34). The cohort effect is in operation here as the current seniors in Singapore have relatively low levels of educational attainment and computer literacy, but research has predicted that future cohorts will be better educated (MCYS, National Survey of Senior Citizens 2005, p. 4; UN World Population Ageing 1950–2050 2002, p. 409). In terms of gender, in the current cohort of seniors, males tend to have higher levels of literacy as compared to females. This is the result of gender socialization and traditional Asian beliefs in the role of women as nurturers and home makers. However, as social change and modernization are sweeping across Asia, the typical gender expectations have undergone a dramatic revolution.

What are some of the barriers faced by older adult learners in Singapore? Research conducted by the Fei Yue Family Service Centre, and funded by the Council for the Third Age throws some light on the issues faced by this group (Thang et al. 2012).

33.4 Barriers to Learning for Older Adults

Attitudinal Barriers Psychological emotions such as fear and lack of confidence have inhibited older adults from enrolling in courses. Other reasons were resistance to learning due to lack of time, work overload and personal duties. Self-perceived notions of being “too old to learn” also persisted in the mindset of some seniors. This could be viewed as a self-fulfilling prophecy as ageism in society may be imbibed by the seniors themselves.

Situational These were factors that were beyond the control of the older adults such as language barriers. The senior may be unable to read and write English but the common mode of instruction at such courses is English. Poor health and lack of support from family or friends were other influences.

Institutional The high cost of fees, lack of accommodation to older adults’ needs, lack of lifelong learning awareness and opportunities amongst seniors were the main institutional barriers (see Fraser et al. 2009, for more discussion on barriers

and adaptations). Inaccessible venues and a pace of teaching that was too fast for the seniors were factors that were posed as obstacles and discouraged seniors from participating. Anecdotal evidence has shown that employers tend to prefer sending younger adults for lifelong learning courses. Surveys undertaken by the [Ministry of Manpower](#) (MoM) have shown a relatively low take up rate in courses dedicated to older workers.

There is no legislation per se on older adult learning/education in Singapore, but the move by government to support lifelong learning through subsidizing employees to enrol for relevant courses through the Skills Development Fund (SDF) is a sign of its commitment. There are annual Lifelong Learning Awards conferred by the President of Singapore on seniors who have shown tremendous resilience in their dedication to improve themselves through adult learning and training. A robust Lifelong Learning Endowment Fund was established by the state in 2001 to support eligible adult learners in their journey of self-improvement.

On January 1st 2012, the Re-employment and Retirement Act (R&R Act) came into force in Singapore which enabled older workers to work beyond the age of 62, the official retirement age. This had implications for continuing education and training of older workers as many had to be appropriately trained with the latest technology to continue working. This gave older workers the imperative to grab opportunities to be trained if they wished to continue working. The author is involved in a research project which is focused on the impact of the R&R Act on older workers. The preliminary findings reveal that older workers wish to continue working mainly to be useful to society by contributing their knowledge and skills. Some faced negative attitudes at their workplace due to stereotypical mindsets of colleagues and employers. However, they were not deterred from working beyond 62 as they felt that the additional income and sense of self-esteem compensated. Those who did not wish to work beyond 62 years had reasons such as poor health and family responsibilities. According to a government report, the share of local employees aged 62 and above in the private sector increased from 4 % in 2010 to 4.9 % in 2011 (Ministry of Manpower [2012](#)) (Retirement and Re-employment Practices, 2012, p. 2).

33.5 Theoretical Underpinnings

The concept of a *learning economy* is more commonly used in Singapore as compared to a *learning society*. This may be a reflection of the society's emphasis on economic utilization of learning, rather than the intrinsic value of learning.

In the Fei Yue Family Service Centre's report (alluded to earlier in this chapter), the six types of wellness were cited, namely intellectual, social, physical, emotional, spiritual and occupational. These parallel the six types of wellbeing identified by the Council for the Third Age (see www.c3a.org.sg) (Council for Third Age [2013](#)) as part of their strategy to improve the wellbeing of seniors in Singapore. Seen from this conceptual framework, learning is both life wide and lifelong (Jarvis [2008](#)).

Learning is referred to by the respondents as linked to the various aspects of their lives, including the religious and spiritual.

On the same token, mentoring and coaching take place when volunteers are being trained at voluntary welfare organizations (Mehta and Huang 2004) or other corporate settings such as banks, and multinational corporations as part of their corporate social responsibility (CSR) programmes. In Singapore, volunteer groups in hospitals are trained to enrich the lives of patients. Older volunteers are frequently found at community level activities such as organizing charity events or senior classes in computer literacy (see Wee, 27/10/13, p. 2). The article features a 68 year old retired seamstress who learned how to use computer software and upgraded her IT skills. She joined the Retired Senior Volunteer Programme (RSVP) Singapore, and after receiving the necessary certification, started teaching other older people powerpoint, digital photo management and other computer software packages.

As mentioned in the YAH! case study, the transformational model of learning is used by some providers as it is a holistic approach which has an experiential emphasis. The Work Pro Programme run by the National Trade Union Congress (NTUC) which focuses on training homemakers to re-join the workforce has a similar approach.

Tertiary institutions use a more knowledge intensive approach such as in the National University of Singapore extension courses. As a University certificate is achieved by the participant at the end of the course, the pedagogy is aligned with the University's standards and policies.

Such tertiary level courses are aimed at the public, and the entry criteria are more stringent than the courses offered by the non-formal or informal sector. Formal learning for seniors is encouraged by SIM University through a tuition fee discount of 20 % for Singaporean seniors above 60 years applying to attain a degree. Alumni of the SIM University are also offered a similar concession. This makes the older adult learning journey attractive for seniors who wish to upgrade themselves or prepare for a second or third career.

33.6 The Catalytic Role of Government

The role of the Singaporean government is that of a *catalyst* in the arena of lifelong learning. The CET Masterplan is imaginative and bold, signalling the commitment of the state to support retraining of (older) adults. The Masterplan emphasizes a partnership model, whereby the public, private and people sectors work together, facilitated by the clustering of the providers under one roof. The CET campuses are "One-Stop Centres" that integrate career coaching, training, assessment and career services (Annex B: Factsheet on the National CET Campuses: 1 retrieved from www.wda.gov.sg). While the main aim of the state is to build manpower capabilities of the workforce, in particular those of adults, the CET Masterplan bodes well for older adults as they may be able to leverage on the new opportunities. However, working adults benefit most from the opportunities for adult learning. Homemakers

and unemployed have difficulties as they may not have sponsorship from employers.

33.7 A Future Outlook

The author is optimistic about the future as the baby boomer generation has arrived; the seniors of this generation are better educated and more financially secure in most cases. They are usually computer literate and therefore able to benefit from the e-courses and online pedagogy. It is sufficient to point out at this juncture that non-formal and formal learning environments must take into account the expectations, learning styles and preferences of seniors (Lamb 2011). It is easier to accommodate third age learners but fourth age learners should be given a voice, especially those in residential settings, where their voices are usually neglected. The era of free online courses will have an impact on local universities and institutes catering to older adults. Free courses offered by international consortiums such as MOOCs and Coursera may derail the private providers, or courses run by community-based organisations. The issue remains whether seniors can cope with online courses and whether they will miss the social aspect of learning. In Singapore, a mindset change is needed towards learning for its own sake, and not for economic reasons alone.

In conclusion, seniors' learning journey should include knowledge about the ageing process due to the importance of multidimensionality of ageing experience. Gerontological education has only recently been accorded importance with the launch of the Master's degree in Gerontology at SIM University. There is much room for development in this arena, particularly with greater awareness among the young seniors about the complexity of issues in later years and the importance of preparation for "the golden years". It would not be inappropriate to say that the term 'educational gerontology' is still in its primary stage in Singapore. It may be predicted that classes will have a greater representation of women seniors as they live longer and have to make up for their earlier loss of opportunities due to caregiving responsibilities. Lifelong learning is a niche area, in particular for older adults, as seniors today in Singapore have a longer lifespan than a few decades ago, and are starting to identify their self-actualisation needs.

References

- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Boston: Sense Publishers.
- Fraser, L., McKenna, K., Turpin, M., Allen, S., & Liddle, J. (2009). Older workers: An exploration of the benefits, barriers and adaptations for older people in the workforce. *Work*, 33(3), 261–272.
- Institute of Adult Learning. www.ial.org.sg. Accessed 1 Nov 2013.

- Jarvis, P. (2008). *Globalisation, lifelong learning and the learning society: Sociological perspectives* (Lifelong Learning and the Learning Society, vol. 2). London: Routledge.
- Lamb, R. (2011). Lifelong learning institutes: The next challenge. *Lifelong Learning Review*, 6, 1–10.
- Mayo, M. (2005). *Global citizens: Social movements and the challenge of globalization*. London: Zed Books.
- Mehta, K., & Cheang, J. C. E. (2008). Effects of good life program on Singaporean older adults' psychological well-being. *Activities, Adaptation and Aging*, 32(3–4), 214–237.
- Mehta, K., & Huang, Y. (2004). A cross-national study of senior volunteerism in two non-governmental organizations in Singapore and P.R. China Hallym. *International Journal of Aging*, 6(2), 157–173.
- Mehta, K. K., & Thang, L. L. (Eds.). (2012). *Experiencing grandparenthood: An Asian perspective*. Dordrecht: Springer Publishing.
- Mezirow, J. (1991). *Transformative dimensions of adult learning*. San Francisco: Jossey-Bass.
- Ministry of Community Development, Youth and Sports. (2006). *National survey of senior citizens, 2005*. Singapore: Ministry of Community Development, Youth and Sports.
- Ministry of Manpower Database. www.mom.gov.sg. Accessed 20 Oct 2013.
- Ministry of Manpower. (2012). *Retirement and re-employment practices, 2011* (Paper No 1/12). Singapore: Manpower Research and Statistics Department.
- SIM University. www.unisim.edu.sg. Accessed 4 Nov 2013.
- Tan, E. S. (2008). *MCYS survey on the learning needs of seniors in Singapore*. Singapore: Ministry of Community Youth and Sports.
- Teo, P., Mehta, K., Chan, A., & Thang, L. L. (2006). *Ageing in Singapore: Service needs and the state*. London: Routledge.
- Thang, L. L., Leng, C. F., Yow, A., & Cai, Y. (2012). *Lifelong learning among older adults in Singapore*. Singapore: Fei Yue Family Service Centre.
- The Council for Third Age. www.c3a.gov.sg. Accessed 5 Nov 2013.
- United Nations Economic and Social Affairs Population Division. (2002). World population ageing 1950–2050.
- Wee, L. (2013, October 27). Ageing with classes. *Sunday Times*, p. 2.
- Workforce Development Agency. www.wda.gov.sg. Accessed 25 Oct 2013.
- YAH! Community College. <http://www.yah.org.sg/english/>. Accessed 25 Oct 2013.

Chapter 34

Slovenia

Sabina Jelenc Krašovec and Sonja Kump

34.1 Introduction

Slovenia is situated in Central Europe and borders Italy, Austria, Hungary and Croatia. It has been a Member State of the European Union since 2004, and in 2010 it joined the Organisation for Economic Co-operation and Development. Slovenia covers 20,273 km² and has a population of two million. It includes a pronounced ageing population, due to decreasing birth rates and increasing life expectancies, even when compared with other European countries. In 2010, older adults (aged 65 or more) represented 16.5 % of the population (Eurostat 2011). In 2060, 31.5 % of the population will belong to this age group, when the old age dependency ratio will increase from 24 to 57 in the 2010–2060 period (European Commission 2011). Slovenia achieved independence from Yugoslavia in 1991. Prior to independence, the welfare system was a combination of a well-developed welfare sector, a non-formal voluntary community and family care, a system which was based on solidarity. After the transition, the Slovenian welfare system changed into the dual system, which was a combination of the conservative-corporatist and the social-democratic systems, which have had, together with three reforms of the pension system, a devastating influence on the socio-economic position of older people (Hlebec et al. 2010). Nevertheless, the GDP per capita in Slovenia experienced a constant increase after gaining independence. However, many older people subsist in living in poverty, with increasing inter- and intra-generational inequalities. The data shows that older people are extremely vulnerable, with an at-risk-of-poverty rate that is twice as high when compared to the general population in Slovenia (Hlebec et al. 2010).

S.J. Krašovec (✉) • S. Kump
Department of Educational Sciences, Faculty of Arts, University of Ljubljana,
Ljubljana, Slovenia
e-mail: sabina.jelenc@guest.arnes.si; sonja.kump@guest.arnes.si

In 2011, among all persons who are below the at-risk-of-poverty threshold, the highest (32 %) share belonged to retired persons (SURS 2012a; Eurostat 2012).

34.2 National Policy on Older Adult Education

Slovenia has no explicit national policy on the older adult education, nevertheless there is the commitment of the governmental policy to improve the social, health and educational possibilities for older people. Older adult education has been included in the sphere of a non-formal education of adults from its beginning, which, in Slovenia, is modestly financed, and therefore loosely supervised and superficially evaluated. It was, and still is, the marginal sphere of education and attracts minimum attention from the government in any sense. In Slovenia, the adult education field is regulated by several acts. The most important one being the *Adult Education Act* (Ministry of Education and Sport 2006), which was adopted in 1996 and revised in 2006, and only regulates the sphere of non-formal adult education, while *The Organisation and Financing Education Act* (Ministry of Education and Sport 2007a) also regulates the sphere of formal adult education. There is no special attention devoted to older adult education in any of these acts. The most important party in the financing and organisation of adult education is the *Resolution on the Master Plan for Adult Education in the Republic of Slovenia 2013–2020* (Ministry of Education, Science and Sport 2013). It determines the main goals, activities and financing of adult education, also concerning the vulnerable groups of adults (older adults are barely mentioned in these groups). In the Resolution, the focus is mostly on the competencies of adults, aged 25–64, with emphasis on employment and work; with adults who are older than 50 years, as well as the employed and unemployed, are mentioned amongst them. In the resolution, older adults are not recognised as a special group with growing importance. Besides these binding documents, the education of older adults is dealt with in some strategies and white papers – namely, the *White Paper on Education in the Republic of Slovenia* (Ministry of Education and Sport 2011), and the *Lifelong Learning Strategy in Slovenia* (Ministry of Education and Sport 2007b) – in which it is stressed that more attention should be dedicated to improve education incentives for older adults, to enhance the accessibility, to programme variety and to provide financial stimulations, as well as to improve the quality of education for older adults in the sense of being in congruence with andragogical principles. Besides other goals, the development of a framework for intergenerational cooperation and intergenerational learning and education is emphasised. This concern is devoted to the local community development, and the cooperation of different subjects on this level. Like in many other states, Slovenia is the signatory state for various European and United Nations' declarations and plans concerning ageing and older adults. Those documents make it obligated to respect and promote care, along with education policies for older people on the national level. Nevertheless, the education policy for older adults in Slovenia remains weak.

34.3 Historical Formations

After the Second World War, adult education in Slovenia (a Yugoslav Republic) developed mostly within the Workers and Folk Universities (now named Adult Education Centres) in school centres for adults and in educational centres belonging to enterprises, but also in different associations (Jelenc 2001). At that time, most of the activities in adult education were occupationally oriented, job-oriented or involved the political education of adults (Krajnc 2012). Older adult education was not exposed as a special field in adult education, nor was it considered as important. After gaining independence in 1991, the continuous development of adult education has been feasible, owing to systemic measures undertaken by the state (*Adult Education Act, White Paper on Adult Education*, etc.) and since then the educational offer has broadened. However, this offer did not increase so much for older adults, as it did for other age groups. The beginning of education that was solely intended for older adults can be traced back to 1984, when the first experimental educational programme for older adults was introduced (Krajnc et al. 1992). This was the first attempt of its kind in former Yugoslavia. In 1984, she decided to invite open applications for a French Course offered for older adults; she named the idea as 'The School of the Third Age' (Findeisen 2010). After 2 years, in 1986, on the initiative of Dušana Findeisen and Ana Krajnc, volunteers from the Slovenian Adult Education Association (SAEA) set up the basis for the first Slovenian University of the Third Age (UTA), which was founded (in the cooperation with the Faculty of Arts, University of Ljubljana) in Ljubljana, as a section of the Section for the Third Age Education (SAEA). UTAs have developed as independent, non-governmental, non-profit, voluntary organisations, registered as associations, which were functioning outside of the traditional universities, and were defined as a voluntary educational movement, meant for those aged 50+, mostly comprised of retired people (UTA 2013).

The concept of Slovenian UTA was connected with work of Pierre Vellas (1997), the founder of French UTA of Toulouse, from the beginning. The founding ideas and the further development of the Slovenian UTA were congruent with the main goals of the French UTA (Vellas 1997). The purpose and the goal of the arising UTAs in Slovenia were to increase the quality of life for older people, in order to provide them with culture and possibilities for an education, and therefore contribute to changing their social and economic position, but also to foster intergenerational cooperation and learning, and to research and develop the field of older adult education and learning. The work was based on a learner-centred approach (Krajnc 2012). Due to its goals and content, we can conclude that the Slovenian UTA mostly follows a liberal and humanistic tradition in adult education (Elias and Merriam 2005; Zinn 1990). Its primary mission is the education of older adults for personal growth, their integration into society and changing the view on ageing (Findeisen 2009); its main goal is expressive and not instrumental. The mission has been changed partly over time, and nowadays it includes the improvement of older people's quality of life in relation to all generations (Šantej 2009). The development of

the UTA in Slovenia was accompanied by the public campaign for changing the attitudes towards the education of older adults and their social situation; the concept is therefore a result of the continuous connection between the practice of older adult education and research.

34.4 Key Characteristics, Structure and Organisation

In Slovenia, older adult education is particularly concerned with general, non-formal education, where the prevailing share of the range of organised education is offered by the UTAs and Adult Education Centres (AEC). Slovenia has a network of 46 UTAs, which are organised by the Slovenian Association for the Universities of the Third Age. The Slovenian Association for the UTAs has developed education with the purpose for raising the employability of older people, pre-retirement courses, education for local development and voluntary work, intergenerational learning and leisure-time education, where its members are involved with international co-operations and EU projects. The UTAs are active in 43 Slovene localities, with about 21,000 students, 147 educational programmes (2011/2012), more than 1000 mentors and more than 2000 library volunteers, AECs and societies of retired persons (Findeisen 2012). The activities of the UTAs have recently reached small towns. Among the UTA courses, the majority are liberal arts subjects, and some of the UTAs offer educational guidance and counselling for older people. In linkage with companies, the UTAs have developed a network of mutual computer literacy programmes for older adults and an exchange of knowledge called 'Each One Teaches One' (UTA 2013).

The basic form of education in the UTA is the study circle, comprised of a small study group of 10–14 participants, who are interested in the same subject. Other education forms are lectures, study trips, educational camps, learning in pairs, research learning, summer UTA, etc. (Šantej 2009). Mentor and participants with knowledge, experience and culture, are an important source of learning. The mentors are young university graduates, professionals, artists, university teachers, etc. Educational meetings take place once or twice a week, and are continuous throughout the study year. The UTA's educational data for Slovenia in 2009 indicate that the majority of participants have a post-secondary or higher education degree, a Masters' Degree or a Doctorate (59.4 %), and only 1.4 % of participants have primary school or less. Where the majority of the participants are women (90.6 %) and most of the UTA participants take the humanities, social studies, art (56.4 %) and languages (35.2 %), with the field of natural sciences amounting to only 1.1 %, the primary motive for participation in UTA is a wish or a need for knowledge (*ibid.*: 26–29).

The AECs are public organisations for adult education, and there are currently 28 AECs in the territory of Slovenia. Most of the AECs offer general non-formal programmes for adults, which are also attended by older adults. Some AECs perform programmes of the Third Age University and study circles. Study circles consist of a special form of adult education appeared in Slovenia, and are offered by very different organisations and institutions. In 2011, around 200 study circles with more

than 2000 people were carried out in Slovenia. In 2009, retired people formed 34.6 % of the participants, where women were a majority (Bogataj 2012). At the same time, some AECs also have courses catering exclusively for older adults (Association of Slovenian Adult Education Centres 2013). Activities within various associations, clubs and other voluntary organisations are an important addition to the educational opportunities available to older adults, since they have a number of educational contents within the frame of their basic activities. Retirement associations are especially important, since there are 507 associations with 228,405 members (ibid); they prepare various sporting, recreational, cultural, educational and social programmes, among others, on a local level.

In the last years, the paradigm of intergenerational learning and cooperation became more recognised and some intergenerational community centres were founded. Besides, the number of Day Activity Centres for Older People (2013), financed by municipalities, is increasing. Their activities are basically social in their focus, but many are also offering interesting learning activities. The Anton Trstenjak Institute of Gerontology and Intergenerational Relations (2013) developed the network of intergenerational groups, and the network of self-support groups for older people, which is based on volunteer work, where the latter is now an activity for The Slovenian Social Gerontology Association (2013). In 2006, the network consisted of 486 groups, 5132 older people and 755 leaders, amongst whom 53 % are volunteers. Intergenerational activities, which include intergenerational learning, are also conducted by Slovene Philanthropy (2013), the association for the promotion of voluntary work. For instance, the Festival of the Third Age (2013) is mostly connected with the education of older adults. It is a combination of lectures, workshops, round tables and discussions. Although, most of activities were intended for older people in the first place, the festival becomes intergenerational, connecting representatives from civil society, voluntary associations and other organisations from different spheres of interest (political, academic, social, economic, etc.).

In recent years, the UTA in Slovenia has also been networking with public institutions, which have established a network of cultural mediators in Slovenian museums, cultural mediators in the University Medical Centre, garden volunteers in the University Botanic Gardens, volunteer storytellers, etc. A case study of a successful initiative by one of the Slovenian UTAs concerns the education of older adults in voluntary work at the botanic garden. The main objectives of the project was to combine education and garden volunteering, to establish active intergenerational relationships within the community, to protect biodiversity of the botanical garden and to raise public awareness on the topic (Jare 2012). Volunteers are older adults, who study botany at the UTA, many of whom are given additional learning possibilities on the botany of invasive plant species; these are held in the Botanic Gardens Ljubljana. Volunteers have been offered a new public space and they use it to perform their different intergenerational learning activities in order to present their learning results. They also perform as mediators between the Botanic Gardens Ljubljana and various NGOs, which influences the higher attendance of visitors in the Gardens (ibid. 2012). For the future, there are plans for garden volunteers to gain even more knowledge on different plants and to become plant ambassadors for visitors and professionals.

In Slovenia the experimental pre-retirement programme was prepared in 1998 by the Slovenian Association for UTA, in cooperation with the Slovenian Social Gerontology Association (Krajnc 1999). Today there are single cases of such programmes, which are prepared by rare employers/organisations. For example, the Ministry of Defense has been organising pre-retirement courses for their employees since 2005, with the intention to prepare them for personal, family and community changes. In Slovenia, the requirements for employers concerning pre-retirement educational programmes, as defined by law, do not exist.

34.5 Participants in Older Adult Education

The data on older adult participation in organised education in Slovenia shows that a very small share of older people are involved in organised education. Though the offer of education for older adults has improved in the last decades, the participation has not increased and remains at approximately 10 % (Kump and Jelenc Krašovec 2007). The data shows that the more organised and long-term forms of education are primarily attended by women and older people with higher degrees of education (at least secondary school and more), aged from 50 to 65 years (Kump and Jelenc Krašovec 2012, 2014). The feminisation of the education of older adults, as noted in other countries (Findsen 2005; Formosa 2012), is therefore also present in Slovenia. Besides gender and the level of education, in our country, the previous occupation has had an important influence on willingness of older adults to participate in education (Kump and Jelenc Krašovec 2012); this is congruent with our findings from other research (McGivney 2001; Sargant 2000; Withnall 2006). We can assume that some groups of older adults are marginalised in Slovenia.

Older adults, who don't participate in organised educational activities in educational organisations, are mostly defined as non-learners. Our research shows that, especially in rural areas, there is a lack of providers for the education of older adults, but there are a considerable number of interest-oriented voluntary associations, many of which are intergenerational as well (Kump and Jelenc Krašovec 2012). They often attract men more, but also the less educated older people who were not active learners in the past. Learning in these community organisations is more action and problem-oriented, situated and informal, and simultaneously takes place with socialising and conversation.

We can conclude that the more educated women in town benefit from the offer of educational activities for older adults the most. This means that it is necessary to rethink the whole range of offerings in communities with respect to the content and education forms in order to increase the participation of the more vulnerable and frail groups of older people in education and learning in Slovenia (less educated men and women, the socially and economically deprived older adults, older people from rural areas, older people, living in homes for older people, frail older people, etc.).

34.6 Key Issues and Future Prospects

Research in Slovenia shows that there is an important difference between the level of education of the current generation of older adults and the adults who are about to enter this period (Kump and Jelenc Krašovec 2007; Jelenc Krašovec and Kump 2014). Available data for the past and present (SURS 2012b) shows that the educational level of older people is increasing; the future generations of older adults in Slovenia will be better educated, more demanding regarding the educational offer and will also probably have a higher degree of motivation for education in later years. The existent educational offer does not answer the actual diverse needs of different groups of older people. The level of participation of older people in educational programmes is very low, due to different factors (their level of education, limited mobility and access to education, stereotypical perceptions of ageing and fear to enrol in educational activities, but also due to their way of life, which is connected with the poverty of many older people, regardless where they live); non-participants mainly quote situational barriers, like lack of time, health and financial problems, distance from the educational site and care for family members.

The offer for older adults is unevenly distributed across the country; there are noticeable differences between regions and municipalities concerning the quantity and quality of the education on offer. In urban areas, there are plenty of formal and non-formal educational possibilities for older people, services and good, accessible information, but there are also the possibilities for informal learning and socialising in community settings; in rural areas, opportunities for older people are mainly provided by voluntary associations, which offer leisure-time activities and some informal learning. The education providers for older people in Slovenia and similar community organisations, which have older people as members/participants in their programmes, are basically not as well connected, which results in an imbalance and a lack of coordination between the supply of education for older people and the financial and spatial problems in communities. The current educational providers neither evaluate the older adults' needs nor plan to widen and improve the quality of the educational and social offerings for older people; there is no in-depth consideration for educational organisers on how to attract older non-participants. The majority of older adults remain educationally and socially non-active, and the sphere of older adult learning is slowly, and partially, developing. Inequalities, derived from initial education and the education of middle age adults, are therefore even more present in older age. In the future it will be necessary to put more attention into the further development of different forms of community education, which includes heterogeneous programs and activities for older people regarding their various needs, motivation and barriers that hinder participation; also the further development of intergenerational learning programmes is needed. Adult educators will have to consider the possibilities to develop and conduct community-based education, but also programmes, which can be implemented in different educational, social and cultural institutions.

The new possibilities should not only include the understanding of older adults as a 'well of knowledge', but also the dynamic possibility of their role. It is extremely important that older adults are the prime movers and originators in the content and execution of educational activities. The educational offer for older adults in Slovenia generally lacks the potential to empower and promote critical awareness of older people in their economic, social and cultural circumstances. We also lack possibilities to raise awareness concerning the stereotypical conceptions about older people, and old age for different age groups, and those who work with older people in general, the mentors/educators of older people in different institutions and settings are poorly educated in the sense of being specialised in educational gerontology and geragogy, but also in community and intergenerational education. The specialised field would include educational programmes for different professionals, dealing with frail older people (in the fourth age) who also need appropriate opportunities for education and learning. The data shows that for Slovenia, staff in old people's homes, and other social care institutions, mostly don't perceive education as being necessary for frail older people, but believe that all they need is social and health care. There is yet no recognised need for the more systematic development of learning activities for people in the fourth age.

In the offer of educational programmes for older adults, the organisations for employment and work are also of importance in the development of various employment activities for older adults; they can take place with full employment or as voluntary work in organisations within the community. In both rural and urban municipalities in Slovenia, the further steps taken to improve the quality of the educational opportunities for older people would be: educational programs that are free of charge and accessible; responsive content and the organisation of education, based on older adults' needs; the networking of different activity providers for older people in the community and competent and trained staff at educational institutions. The preparation of appropriate local and national educational policies, based on the principles of critical educational gerontology, will have to be applied, with local administrations taking over the responsibility for providing opportunities in education. Educators and volunteers will have to be encouraged to create communities that will become learning spaces for diverse groups of adults. According to the deepening of the economic crises in Slovenia, we can assume that social inequality among older people will increase, where we can expect the gap between groups of older people, according to their social and economic position, to widen. The role of the state in diminishing factors, which hinder the participation of older adults in education, should be more decisive and the education of older adults should not be left to the market mechanisms.

References

- Anton Trstenjak Institute of Gerontology and Intergenerational Relations. (2013). *Anton Trstenjak Institute of Gerontology and Intergenerational Relations*. <http://www.inst-antontrstenjaka.si/old/eng/>. Accessed 16 Aug 2013.
- Association of Slovenian Adult Education Centres. (2013). *About the Association of Slovenian Adult Education Centres*. <http://www.zlus.si/eng/index.aspx>. Accessed 19 Sept 2013.
- Bogataj, N. (2012). *Analiza študijskih krožkov*. (Analysis of study circles. Report). Ljubljana: Andragoški center Slovenije.
- Day Activity Centres. (2013). *DCA Ljubljana-Dnevni centri aktivnosti za starejše* (DAC Ljubljana-Day activity centres for older people). <http://www.dca-ljubljana.org/index.html>. Accessed 11 Aug 2013.
- Elias, J. L., & Merriam, S. B. (2005). *Philosophical foundations of adult education* (3rd ed.). Malabar: Krieger.
- European Commission. (2011). *The 2012 ageing report: Underlying assumptions and projection methodologies*. http://ec.europa.eu/economy_finance/publications/european_economy/2011/pdf/ee-2011-4_en.pdf. Accessed 14 Aug 2013.
- Eurostat. (2011). *Population projections for Slovenia, 2010–2060 – Final data*. http://www.stat.si/eng/novica_prikazi.aspx?id=3989. Accessed 11 Aug 2013.
- Eurostat. (2012). *At risk of poverty or social exclusion in the EU27*. http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/3-03122012-AP/EN/3-03122012-AP-EN.PDF. Accessed 11 Aug 2013.
- Festival of the Third Age. (2013). *13th Festival of the Third Age*. <http://en.f3zo.si/>. Accessed 10 Aug 2013.
- Findeisen, D. (2009). Izobraževanje starejših odraslih in pomen njihovega izobraževanja za njih same ter družbo (Education in later life – The meaning of education for both older people and society). *Andragoška spoznanja*, 15(3), 12–21.
- Findeisen, D. (2010). *Ljubljana's Third Age University: A creation of its townspeople, and the tie between the two*. Ljubljana: Društvo za izobraževanje za tretje življenjsko obdobje.
- Findeisen, D. (2012). The Third Age University of Slovenia. *EUROPA*, 31. <http://europa.eu/ey2012/ey2012main.jsp?catId=975&langId=en&mode=initDetail &initiativeId=183&initLangId=en>. Accessed 15 Aug 2013.
- Findsen, B. (2005). *Learning later*. Malabar: Krieger Publishing Company.
- Formosa, M. (2012). Lifelong education for older adults in Malta: Current trends and future visions. *International Review of Education*, 58(2), 271–292.
- Hlebec, V., Kavčič, M., Filipovič Hrast, M., Vezovnik, A., & Trbanc, M. (2010). *Samo da bo denar in zdravje: življenje starih revnih ljudi*. (As long as we have money and health: the life of the underprivileged elderly). Ljubljana: Faculty of Social Sciences.
- Jare, T. (2012). Vir project – Garden volunteers reshaping the educational role of a botanical garden. In S. Jelenc Krašovec & M. Radovan (Eds.), *Intergenerational solidarity and older adults' education in community* (pp. 345–348). Ljubljana: Znanstvena založba Filozofske fakultete Univerze v Ljubljani.
- Jelenc, Z. (2001). Lifelong learning policies in transition countries. In D. Aspin, J. Chapman, & M. Hatton (Eds.), *International handbook of lifelong learning: Part I* (pp. 259–284). Dordrecht: Kluwer Academic Publishers.
- Jelenc Krašovec, S., & Kump, S. (2014). Education of older adults in communities with varying levels of well-being. *Educational Gerontology*, 40(3), 212–229.
- Krajnc, A. (1999). Paradoks tretjega življenjskega obdobja (The paradox of life's third age). *Andragoška spoznanja*, 5(3), 5–18.
- Krajnc, A. (2012). Older adults as a special learner audience. In S. Jelenc Krašovec & M. Radovan (Eds.), *Intergenerational solidarity and older adults' education in community* (pp. 4–19). Ljubljana: Znanstvena založba Filozofske fakultete Univerze v Ljubljani.

- Krajnc, A., Mijoč, N., & Findeisen, D. (1992). *Kako smo snovali Univerzo za tretje življenjsko obdobje* (How we were forming the University of third age). Ljubljana: Slovenska univerza za tretje življenjsko obdobje.
- Kump, S., & Jelenc Krašovec, S. (2007). Education: A possibility for empowering older adults. *International Journal of Lifelong Education*, 26(6), 635–649.
- Kump, S., & Jelenc Krašovec, S. (2012). Izobraževanje starejših in blaginja lokalnih skupnosti (Older adult education and the well-being of local communities). *Sodobna pedagogika*, 63(5), 84–102.
- Kump, S., & Jelenc Krašovec, S. (2014). The educational opportunities for older adults in rural and urban municipalities. *Anthropological Notebooks*, 20(1), 51–68.
- McGivney, V. (2001). *Fixing or changing the pattern? Reflections on widening adult participation in learning*. Leicester: NIACE.
- Ministry of Education and Sport. (2006). *Adult Education Act*. Official Gazette of the RS, 110. <http://www.uradni-list.si/1/objava.jsp?urlid=2006110&stevilka=4673>. Accessed 10 Aug 2013.
- Ministry of Education and Sport. (2007a). *The organisation and financing act*. Official Gazette of the RS, 16. <http://www.uradni-list.si/1/objava.jsp?urlid=200716&stevilka=718>. Accessed 16 Sept 2013.
- Ministry of Education and Sport. (2007b). *Lifelong learning strategy in Slovenia*. Ljubljana: Ministry of Education and Sport.
- Ministry of Education and Sport. (2011). *White paper on education in Slovenia*. Ljubljana: Ministry of Education and Sport.
- Ministry of Education, Science and Sport. (2013). *Resolution on the master plan for adult education in the Republic of Slovenia from 2013–2020*. http://zakonodaja.gov.si/rpsi/r07/predpis_RESO97.html. Accessed 18 Aug 2013.
- Šantej, A. (2009). Razvoj in poslanstvo slovenske univerze za tretje življenjsko obdobje (Development and mission of the Third Age University). *Andragoška spoznanja*, 15(3), 22–30.
- Sargant, N. (2000). *The learning divide revisited*. Leicester: NIACE.
- Slovene Philanthropy. (2013). *Slovene philanthropy*. <http://www.filantropija.org/en/>. Accessed 16 Aug 2013.
- SURS. (2012a). *International Day for the Eradication of Poverty 2012*. http://www.stat.si/eng/novica_prikazi.aspx?id=5070. Accessed 15 Aug 2013.
- SURS. (2012b). *Socioeconomic characteristics of population*. http://www.stat.si/eng/novica_prikazi.aspx?id=5411. Accessed 11 Aug 2013.
- The Slovenian Social Gerontology Association. (2013). *The Slovenian Social Gerontology Association*. http://www.skupine.si/o_zvezi/vizitka/. Accessed 16 Aug 2013.
- UTA. (2013). *The Third Age University of Slovenia*. <http://www.univerzazatretjeobddrustvo.si/english.html>. Accessed 16 Aug 2013.
- Vellas, P. (1997). Genesis and aims of the Universities of the Third Age. *European Network Bulletin*, 1, 9–12.
- Withnall, A. (2006). Exploring influences on later life learning. *International Journal of Lifelong Education*, 25(1), 29–49.
- Zinn, L. M. (1990). Identifying your philosophical orientation. In M. W. Galbraith (Ed.), *Adult learning methods: A guide for effective instruction* (pp. 39–56). Malabar: Krieger.

Chapter 35

South Africa

John Aitchison and Peter Rule

Prior to the advent of full democracy in 1994, South Africa had little by way of adult education provision, particularly for members of the majority of the population who were not considered citizens, senior or otherwise. It might be expected that after the election of Nelson Mandela as President the situation changed for the better, but, on the whole, advances in adult education have been somewhat sporadic (Aitchison 2003a, b, 2004; Baatjes and Mathe 2004; Rule 2006) and only in the last 10 years have we seen much specific attention paid to the older citizen.

This chapter begins by providing a brief historical overview of education policy developments in South Africa related to older adults and then presents two case studies. It seemed appropriate to examine two contemporary initiatives that cater for older adults at different ends of the education spectrum, rather than just one, because educational inequalities are still deeply rooted in South Africa and the educational experiences of older adults vary accordingly. Therefore, we focus on the Kha Ri Gude mass literacy campaign and the University of the Third Age. We go on to tease out some of the key issues that are pertinent to the education of older adults in South Africa: access, articulation and target group coverage.

35.1 Historical Background

In the twentieth century, subsequent to the establishment of the Union of South Africa in 1910 and the gradual entrenching of a racist and segregationist system that took final form in the apartheid state from 1948 to 1994, education for older people could be found mainly in religious form and in a more limited way in various

J. Aitchison (✉) • P. Rule

Centre for Adult Education, University of KwaZulu-Natal, Pietermaritzburg, South Africa
e-mail: aitchisonjjw@gmail.com; rulep@ukzn.ac.za

non-formal educational and cultural activities largely directed to well-educated upper-middle class whites. University extra-mural classes based on the British model were first run in 1889 in Cape Town and other initiatives were organised by the National Council of Women (established in 1933) and particularly, the South African Women's Agricultural Union (established in 1931). The University of Cape Town's extra-mural activities considerably pre-date that of the other South African universities which instituted such programmes in the 1970s and 1980s, notably the universities of Natal, the Witwatersrand and the Western Cape.

By the end of the 1960s the apartheid state had severely circumscribed all sites of independent "open to all" adult education practice except those provided by the "liberal" universities which, through their defence of their academic freedom, still held the potential for limited adult education work (Mackie 1995). Their programmes were initially a mix of liberal extra-mural courses and those focused more directly on discussion of current political and social issues. The attendees tended to be older, university educated, white people though these courses were in principle open to all. (In the 1980s and 1990s these university extra-mural programmes expanded into dynamic and often politically engaged departments or centres of adult education involved in community outreach and which later took on responsibility for teaching adult educators. They also exercised considerable influence on post-apartheid adult basic education policy development).

The more immediate origins of formal adult education in South Africa for less well educated black people began with the development of night schools. Although this is often referred to as "the night school movement", it comprised sporadic initiatives which began in the early 1920s and eventually grew into the beginnings of a system in the 1940s. This incipient system of provision was destroyed by the apartheid government in the late 1950s (until partially reinstated in the late 1970s). It must be noted, however, that people enrolled in night schools usually saw their studies as a route to employment or better employment. This focus on employment-related skills became even more dominant when, post 1994, a new Adult Basic Education and Training system was built on what there was of the old state night school system (Aitchison 2003a).

35.2 Adult Education Under the New Democracy

Chapter Two of the new South African constitution of 1996 contains a Bill of Rights whose Section 29 states that:

Everyone has the right to a basic education, including adult basic education; and to further education, which the state, through reasonable measures, must make progressively available and accessible.

The Section also states that:

Everyone has the right to receive education in the official language or languages of their choice in public educational institutions where that education is reasonably practicable. In

order to ensure the effective access to, and implementation of this right, the state must consider all reasonable educational alternatives, including single medium institutions, taking into account equity; practicability; and the need to redress the results of past racially discriminatory laws and practices.

These important statements are notable in not making any exception on the grounds of age.

The new Adult Basic Education and Training policies post-1995 were very work-orientated and adopted a competency and standards-based approach with little attraction or usefulness for older people. This reflected a wider global trend, informed by neoliberal capitalism, towards instrumental, market-oriented forms of adult education (Baatjes 2003; Arnove et al. 2013). In addition, the state Public Adult Learning Centres (the old state night schools run in school classrooms after hours) were generally attended by youth rewriting the Grade 12 examinations they had failed at school and were an unattractive venue for older people.

35.3 The Kha Ri Gude Mass Literacy Campaign

A change came, at least for non-literate or semi-illiterate people, with the Kha Ri Gude (“Let us learn”) mass literacy campaign that started in 2008. After a somewhat abortive literacy campaign in 2001, a Ministerial Task Team on Literacy developed a detailed proposal for a large scale campaign to reach some 4.7 million people. Their report had a very interesting set of remarks about the need to serve older people as well (Ministerial Committee on Literacy 2006, p. 17):

There may also be arguments about investing resources in another group: the 1.4 million who are over the age of 64. However, it should be remembered that the elderly in South Africa play a significant role in childcare and it is important that they help provide a pro-literacy environment to the young.

As with most South African adult education policies since 1994, even this discourse about education for older people was mainly about education and skills considered economically or socially valuable rather than what had value mainly for personal, cultural or leisure use.

The final literacy campaign target calculations included people up to the age of 74 though the priority age groups were the 15–19 and 25–54. The demographic information used came from the national census of 2001 which had these figures for poorly educated older people (Ministerial Committee on Literacy 2006, p. 141) (Table 35.1).

In the period 2008–2013 the state funded national Kha Ri Gude literacy campaign registered 3, 590, 942 adult learners (of whom about 90 % completed the 6 month course). Each year about 40, 000 voluntary educators ran the classes (and received a small stipend).

Table 35.1 Age group by highest education level

Age group by highest educational level: Census 2001									
Age group	No schooling	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grand Total	
15-19	153,083	24,792	32,707	67,749	124,234	207,395	339,621	949,581	
20-24	286,269	15,329	23,400	44,337	69,838	91,392	127,341	657,906	
25-29	344,698	18,718	28,820	54,530	81,012	101,035	134,149	762,962	
30-34	364,652	19,402	32,408	63,381	94,231	113,237	147,950	835,261	
35-39	452,369	24,598	41,250	79,548	115,115	130,697	167,971	1,011,548	
40-44	476,930	26,290	43,532	82,160	114,178	121,675	153,952	1,018,717	
45-49	460,994	25,832	40,892	75,706	102,808	102,217	126,489	934,938	
50-54	428,744	21,453	33,984	61,869	80,796	78,127	96,743	801,716	
55-59	344,303	16,922	25,494	43,546	56,288	54,985	68,446	609,984	
60-64	394,010	15,957	23,095	38,102	46,065	44,571	53,146	614,946	
65-69	320,218	11,831	16,531	26,811	32,119	30,757	36,689	474,956	
70-74	296,664	9396	13,019	19,488	22,799	21,207	24,880	407,453	
75-79	164,741	5403	7108	10,772	12,846	11,519	14,159	226,548	
80-84	147,447	4180	4967	7133	8161	7023	8452	187,363	
85 +	85,464	2260	2741	3767	4280	3747	4702	106,961	
Totals	4,720,587	242,363	369,948	678,899	964,771	1,119,583	1,504,689	9,600,840	

Source: Statistics South Africa (2003)

Table 35.2 Kha Ri Gude literacy campaign: older learners: 2008–2011

Kha Ri Gude literacy campaign: older learners: 2008, 2009 and 2011					
Year	Total	Older learners	60–69	70–79	80+
2008	357,195		(16 %)	(10 %)	
2009	648,423	152,306 (23 %)	97,599 (15 %)	52,674 (8 %)	2033 (0.3 %)
2011	660,924	137,841 (21 %)	86,473 (13 %)	48,636 (7 %)	2732 (0.4 %)

Source: Kha Ri Gude unit documents

The statistics on the number of older people who participated in the Kha Ri Gude Literacy Campaign classes indicate that slightly over 20 % were categorised as “older learners” in the years 2008–2011 (Table 35.2):

The Kha Ri Gude campaign was designed to improve cognitive ability through its development of reading, writing and numeracy skills, activities that are known to positively influence memory and reasoning among older people (United States Department of Health and Human Services 2004). An interesting outcome was that there was no significant difference in the results of older learners on the portfolio of assessment exercises completed by all the learners.

Other findings, drawn from reports from campaign monitors on their visits to classes, were that older people found the literacy classes stimulating and engaging. The following are typical evaluation responses taken from older learners:

- *Joining a class is interesting.*
- *It is nice to meet other people in the class.*
- *I no longer feel depressed.*
- *I can handle my own pension.*
- *I feel better about myself and am more confident.*
- *I can help my grandchildren with their homework.*
- *I am able to read the Bible for the first time in my life.*
- *I am able to sign my name.*
- *I am not cheated by my grandchildren who have to draw my money from the ATM.*
- *I need to know how to read because I am looking after my grandchildren who are orphaned.*

The attention given to older learners is particularly striking in respect of the disabled (blind, deaf, physically handicapped and mentally challenged). The campaign made special provision to meet the needs of adults with disabilities (many of whom were older) by, for example, developing Braille materials and training Braille facilitators to include the visually impaired (Fig. 35.1, Table 35.3).

Also of note is that more than 2 % of the volunteer educators were above the age of 60.

This literacy campaign received support from the South African Council for the Aged which was founded in 1956 and now, renamed as “Age-in-Action”, has over 800 NGOs as members who provide various services to older people. Amongst its aims are “to provide empowerment programmes for vulnerable and needy older

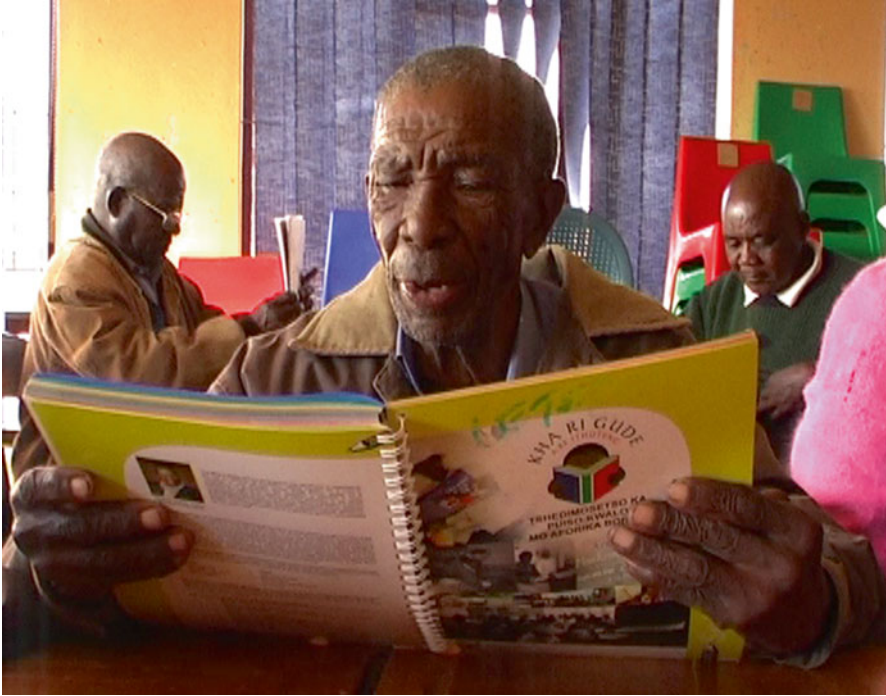


Fig. 35.1 Older adult learning in Kha Ri Gude campaign. (Source: John Aitchison: Photograph taken at a Kha Ri Gude class in the Shoshanguve district on 11 June 2008 with permission of the participants)

Table 35.3 Kha Ri Gude literacy campaign: disabled learners: 2008–2010

Year	Total disabled	Older disabled	60–69	70–79	80+
2008	27,120	10,882 (40 %)	5553 (20 %)	3414 (13 %)	1915 (7 %)
2009	72,620	20,790 (29 %)	12,253 (17 %)	8086 (11 %)	451 (1 %)
2010	28,858	9414 (33 %)	5510 (19 %)	3694 (13 %)	210 (1 %)

Source: [Kha Ri Gude unit](#) documents

persons *visa viz.*, adult education” and “to initiate prevention and educational programmes on HIV/AIDS for older persons” (Age-in-Action 2013, p. 1). It helps equip service centres and luncheon clubs running basic adult education programmes with a basic library kit to be used by members of the community.

Since 1981 the organisation has advocated for a model for aged care known as The People Empowerment Programme (PEP) that promoted local responses to the needs of older persons through actions by volunteers in delivering sustainable services such as provision of meals, home care, home visits, income generation projects and companionship. In the process, luncheon clubs were developed and promoted. Older persons are carrying the brunt of the HIV/Aids pandemic in South

Africa; almost 19 % of all households are run by them. This means that new care and support work has been developed to help the third generation parents to cope with ever increasing pressures.

Among the organizations that include older adults are a number of specialized societies (e.g. art/history/ecological/fitness) in the larger cities that tend to be dominated by retired well-educated middle class people. In addition, a remnant of the universities' extra mural programmes, such as that of the University of Cape Town's Summer School and the Lifelong Learning KwaZulu-Natal are patronized by many older adults. The University of the Third Age, to which we now turn, also caters for many of the specialized interests of older adults.

35.4 The University of the Third Age

There is an extensive international literature on the University of the Third Age (U3A), which had its origins in Toulouse, France in 1972 and has spread to countries all over the world (Findsen 2005; Huang 2006; Formosa 2010, 2013). The South African version of U3A took root in Cape Town in 2000 where it received a very enthusiastic response and has grown to 8, 000 members in six branches in and around the city. The Central Cape Town branch alone has 1, 500 members. It spread to other centres and now has approximately 11, 000 members across 26 branches (U3A South Africa, undated). It has a decentralised structure and is run by local branch committees elected at annual general meetings, with meetings held at private homes, church or community halls, or local libraries.

While the Kha Ri Gude campaign caters for non-literate or low-literate older adults who are, as a result of South Africa's apartheid history, predominantly black African, and located in townships and rural areas, the University of the Third Age focuses on an entirely different demographic: predominantly white middle- and upper middle class older adults no longer in full-time employment. This constituency lives in the suburbs of the larger urban centres such as Cape Town, Johannesburg and Durban, as well as in smaller towns known as preferred places of retirement, such as Howick in the KwaZulu-Natal Midlands, and Hermanus, Knysna and Plettenberg Bay in the Western Cape. U3A branches emphasise in their documents that membership is open to all persons interested in supporting its objectives "irrespective of religion, culture, race or educational background" (University of the Third Age Port Elizabeth undated, p. 1). However, the location of activities and transport difficulties mean that, in effect, membership tends to be middle class and "lily-white", as one committee member put it, with some exceptions in Cape Town. One branch exists in the traditionally "Coloured" (mixed race) area of Athlone, and a new branch has been started in Gugulethu, a black African township (Interview CT1, 2014).

Although different U3A branches formulate their aims in slightly different terms, there are three main foci. The first is around learning and "intellectual stimulation"—encouraging members to share their knowledge with others and learn from others.

The second, arising from and embedded in the first, is social and concerns providing social contacts for its membership. As one committee member put it, “To provide continuing education, stimulation and *companionship* (our emphasis) for the retired people” (Interview CT1, 2014). For some members this is the primary motivation for joining, especially those who have been widowed or whose children live far away. As a committee member put it, “The name is a little bit off-putting for some – more ‘learned’ than it is. In actual fact, here [Durban] the aim is more social, getting to know people and trying to learn new things” (Interview D2, 2014). The third is an advocacy aim and asserts the ability of older adults to continue learning: “To refute the idea of intellectual decline with age” (University of the Third Age Port Elizabeth undated, p. 1). U3A thus views older adults in terms that are very different from those of contemporary stereotypes: active, intellectually and socially engaged rather than passive, intellectually and physically declining, and isolated. This resonates with the international emphasis of U3As in “contributing strongly to the ongoing construction of societies where people age positively” (Formosa 2013, p. 234).

U3A’s approach in South Africa resonates with a liberal humanistic view of learning as valuable for its own sake. This contrasts with the instrumentalist, market-oriented emphasis of much adult education provision. However, there is also a strong social learning element in which the experiences of older adults are valued as resources for collective engagement and learning (learning and interacting with others). It also aligns with a lifelong learning perspective: that learning happens throughout the lifespan and does not necessarily decline with age.

U3A activities also differ from one branch to another but there is a common core of intellectual and social activities. The intellectual activities include once-off talks or courses delivered by current or retired academics or “enthusiastic amateurs” on particular topics, such as history, art appreciation, literature, languages, creative writing, current affairs and new communication technologies. Often members themselves are encouraged to give talks or lead courses on topics that they know about; for example, a retired jeweller running a course on gemstones. Social activities include physical exercise such as guided walks, circle dancing, yoga, craft activities such as crocheting, sewing and knitting, and social gatherings such as picnics and lunches. U3A also organises tours to places of interest such as factories, museums and botanical gardens, as well as longer trips to game reserves and Boer War battlefields, for example.

A typical U3A learning event would involve a guest speaker making a presentation on a topic of general interest, often using a computer presentation or other visual media. This would be followed by some time for questions, usually of clarification. There would not typically be an in-depth discussion or debate on the topic, and one member described the level of engagement as “university light”: “People don’t challenge, they don’t like argument and challenge. It’s all very polite and civilised” (Interview D1, 2014). This would be followed by refreshments and socialising.

The annual membership fee is low in all branches. In Cape Town, for example, current fees are R40 (US\$4) for those with e-mail and R60 (US\$6) for those relying on ordinary mail. Members also pay a nominal fee per event such as R5 (US\$0.50) to cover costs of refreshments. Despite these low fees, a committee member reported

that some pensioners could not afford them and so fees were “quietly waived” in such cases. There are no membership requirements related to educational level and no assessment or certification of courses.

Judging by the proliferation of branches and increase in membership, U3A appears to have been very effective in meeting the needs and interests of older, mainly white middle class adults in South Africa. This was corroborated by interviewees – one committee member reported a number of members saying to her, “Gosh, it’s made such a difference to my life having these activities to attend” (Interview D2, 2014). This can be attributed to a various factors: the range of activities (intellectual, recreational, social); the low fees; local control and initiative attuned to local circumstances; and the emphasis on learning for its own sake without the pressures of assessment. Despite these positive factors, both the U3A and Kha Ri Gude cases indicate a number of problematic issues for the education of older adults in South Africa. It is to these that we now turn.

35.5 Educational Accessibility

Whether an older adult is able to benefit from learning opportunities in South Africa depends largely on where they are located and what transport is available at what attendant cost. Kha Ri Gude has wide coverage, but for those who are not in walking distance of a venue, transport might simply not be available. As indicated above, U3A branches are located mainly in middle class suburban areas, which means that they are not easily accessible to older adults living in townships or rural areas. Other factors limiting access to U3A activities include language – English as the predominant U3A language of learning excludes non-speakers of English (only about 10 % of the South African population have English as a mother-tongue) – and cultural ethos: the middle class westernised ethos of U3A activities might not easily accommodate people from different cultural and class backgrounds. Although Kha Ri Gude has made efforts to include adults with disabilities, such as provision of materials in Braille, the wider social barriers to persons with disabilities, such as unsuitable transport and inaccessible venues, limit participation.

South Africa does have a huge distance education university, the University of South Africa, currently with over 300, 000 registered students per annum, which is open to older adults. People over the age of 23 may gain entrance without the normal full matriculation requirements.

35.6 Articulation

Unlike U3A, the Kha Ri Gude campaign does include an assessment regime. However, Kha Ri Gude does not in practice articulate with the existing Adult Basic Education and Training (ABET) system of provision through Public Adult Learning Centres (themselves recognised by the state as somewhat dysfunctional and

currently subject to major policy changes). This means that, when an adult has completed the Kha Ri Gude course, there is no easy channel of progression into an ABET course. One of the problems with this is that newly literate adults need to practise using their literacy skills, otherwise there is the danger that they will lose them. If adult learners cannot progress to higher levels of learning, there is a chance that they will regress to previous literacy levels. Without articulation with a national adult basic education system that actually welcomes and accommodates newly literate learners (and particularly older ones), the longer term educational efficacy of campaigns like Kha Ri Gude is brought into question. Though South Africa has a national qualifications framework and a policy of lifelong learning which in principle allows for easy access to learning, articulation between qualifications and the recognition of prior learning, in practice the rhetoric of lifelong learning is much more prominent than its implementation (Aitchison 2004).

35.7 Target Group Coverage

Our study indicates that adult learning opportunities do exist for older adults in South Africa at either end of the educational spectrum: basic literacy and U3A (which, although not university-equivalent, assumes an “educated” membership) and suchlike. What is missing is provision for the “in-between” group of older adults – those who have a basic education but are not necessarily suburban and/or middle class. While public adult learning centres do provide education beyond basic literacy, they are increasingly dominated by young adults attempting to complete their Grade 12 qualification. Churches provide various learning opportunities in the form of bible studies and courses which include older adults, often in leadership roles, and this is an area that requires further research, as does the area of self-initiated learning among older people outside the formal frameworks. An example of this might be older adults’ mastery of new technologies and social media, often with the help of younger family members. However, besides this spiritual/religious learning, the “in-between” opportunities are scarce, and the development of an authentically inclusive learning nation in which older adults are learning citizens requires further attention.

35.8 Conclusion

Education for older adults in South Africa has largely been neglected until the last decade or so. Two initiatives, the Kha Ri Gude mass literacy campaign and the University of the Third Age, accommodate older adults at either end of the education spectrum. However, these initiatives are restricted by issues of accessibility and

articulation. In addition, there is limited educational provision for the “in-between” group of older adults with some education. Besides these gaps in provision, there are also lacunae in our knowledge of older adult learning in South Africa, particularly in areas such as non-formal religious learning and spiritual formation, learning within community collectives such as savings clubs and burial societies, and self-initiated individual learning projects. What is clear is that the promise of South Africa’s Constitution regarding the right of everyone to basic and further education is, despite some promising developments, yet to be fulfilled for most older adults.

References

- Age-in-Action. (2013). *Age-in-Action. The South African Council for the Aged*. [Website]. <http://www.age-in-action.co.za/new/>. Accessed 14 Mar 2013.
- Aitchison, J. J. W. (2003a). Struggle and compromise: A history of South African adult education from 1960 to 2001. *Journal of Education*, 29, 125–178.
- Aitchison, J. J. W. (2003b). Brak! – Vision, mirage and reality in the post apartheid globalisation of South African adult education and training. *Journal of Education*, 31, 47–74.
- Aitchison, J. J. W. (2004). Lifelong learning in South Africa: Dreams and delusions. *International Journal of Lifelong Education*, 23(6), 1–28.
- Arnove, R. F., Torres, C. A., & Franz, S. (Eds.). (2013). *Comparative education: The dialectic of the global and the local* (4th ed.). Lanham: Rowman & Littlefield.
- Baatjes, I. (2003). The new knowledge-rich society: Perpetuating marginalisation and exclusion. *Journal of Education*, 29, 179–204.
- Baatjes, I., & Mathe, K. (2004). Adult basic education and social change in South Africa. In L. Chisholm (Ed.), *Changing class: Education and social change in post-apartheid South Africa* (pp. 393–420). London/New York/Cape Town: Zed Books/HSRC.
- Findsen, B. (2005). *Learning later*. Malabar: Krieger.
- Formosa, M. (2010). Lifelong learning in later life: The Universities of the Third Age. *LLI Review*, 5, 1–12.
- Formosa, M. (2013). Four decades of Universities of the Third Age: Past, present, future. In P. Mayo (Ed.), *Learning with adults: A reader* (pp. 229–250). Rotterdam: Sense.
- Huang, C.-S. (2006). The University of the Third Age in the UK: An interpretive and critical study. *Educational Gerontology*, 32, 825–842.
- Kha Ri Gude unit. (2008–2012). *Documents*. Pretoria: Department of Basic Education [Unpublished reports and administrative documents].
- Mackie, R. D. A. (1995). *An analysis of policy development within the Centre for Adult Education at the University of Natal (1971–1991)*. Unpublished Master of Education dissertation, University of Cape Town, Cape Town.
- Ministerial Committee on Literacy. (2006). *Ministerial Committee on Literacy: Final report. 19 June 2006*. Pretoria: Department of Education.
- Republic of South Africa. (1996). *The Constitution of South Africa*. (Act no. 108 of 1996). <http://www.gov.za/documents/constitution/1996/a108-96.pdf>. Accessed 14 Mar 2014.
- Rule, P. (2006). ‘The time is burning’: The right of adults to basic education in South Africa. *Journal of Education*, 39, 113–134.
- Statistics South Africa. (2003). *2001 census*. Pretoria: Statistics South Africa.
- U3A South Africa. (undated). *University of the Third Age South Africa*. <https://sites.google.com/site/u3asafrica/home>. Accessed 14 Feb 2014.

United States Department of Health and Human Services. (2004). *Imaging study reveals brain function of poor readers can improve*. *NIH News*, Bethesda: National Institutes of Health, United States Department of Health and Human Services.

University of the Third Age Port Elizabeth. (undated). *Application: What is U3A*. <http://www.u3ape.co.za/>. Accessed 14 Feb 2014.

Interviews

CT1, Cape Town Central Branch U3A, Chairperson, interviewed telephonically 5 March 2014.

D1, Durban Branch U3A, Member, interviewed at home, 14 February 2014.

D2, Durban Branch U3A, Publicity, interviewed telephonically 5 March 2014.

Chapter 36

Spain

Mariano Sánchez-Martínez and Juan Sáez

36.1 Introduction

Thinking about, presenting, and explaining, the situation of older adult education in Spain is no easy task. This is an education that is based on and sustained by the production of a social construct – older adults – which that very education helps to maintain. In Spain, the expression ‘older persons’ (*personas mayores*) is a relatively recent creation, the result, as in other countries, of efforts to problematize and differentiate ageing in human beings. In Western countries, such efforts have been expanding a great deal since the second half of the twentieth century. Currently, the everyday language used in Spanish homes, streets and institutions is plagued with countless objects related ‘to older adults’ or ‘for older adults’ – for example, associations of older adults, residences for older adults, activity centres for older adults, universities for older adults, vacations for older adults, discounts for older adults, exercise classes for older adults, etc. It therefore appears that the processes related to the social production of older adults have been successful. Spain is now a country of older adults, with large numbers of older adults: On January 1, 2013, 23 % of the Spanish population was aged 60 and above. In this cohort 56 % were women. Furthermore, 5.5 % of the population had reached on the same date 80 years or more. In this second cohort of oldest old, the percentage of women mounted to 63.8 %. Consequently to these figures (*Instituto Nacional de Estadística* [INE] [National Institute of Statistics] n.d.), Spain has set up a variety of resources for people 60+. Older adult education is just one item in that range of resources.

M. Sánchez-Martínez (✉)

Department of Sociology, University of Granada, Granada, Spain
e-mail: marianos@ugr.es

J. Sáez

Department of Theory and History of Education, University of Murcia, Murcia, Spain
e-mail: juansaez@um.es

It would be impossible to determine precisely when older adult education emerged in Spain. Long-standing education traditions in this country, such as adult education centres and popular universities, now co-exist with other more recent ones, such as mature learning centres and university programmes for older adults, all part of a network of institutions in which the type of education being addressed here – both formal and informal – have slowly gained ground until fully emerging and becoming consolidated in the Spanish educational scene. In contemporary Spain, nobody doubts that the education of older adults is a relatively common phenomenon. However, in contrast to what people often think, the appearance of older adults – and subsequently, of educational opportunities specifically targeting persons in the later stages of the life course – is not solely or even primarily a demographic phenomenon.

In Spain *older adults* have been constructed as a social category. Which processes have contributed to this construction? We may refer to the invention and expansion of retirement systems – and the non-productive activity associated with retired people; the growing creation, diversification and imposition of positive ageing models (that is, that the ageing process should be satisfactory, successful, active, productive, competent, optimal, etc.), and the assumption of reproductive roles by many older adults (Pérez 2011). Moreover, the creation of public policies have led to the differentiation between *active* and *dependent* elders, which has resulted in differential distribution of power and privileges between diverse generations of older adults (Lenoir 1993).

As a consequence, our position is clear: the existence of a specific ‘older adult education’ based exclusively on age is not justifiable, because age cannot be the criterion that legitimises this type of education (Sáez 2005a). Age (that is, chronological age) is just another form of social discourse and rather than as a pure independent variable it should be viewed as the opposite: the resultant of interests and strengths, of social actions and orders. If age is not adequately problematized, offering education specifically for older adults – understood as those who have lived a certain number of years – is like trying to build a house from the roof down. Unfortunately, this type of problematization has been conspicuously absent from Spanish discourse in this field.

36.2 The Older Adult Education We Have Now

If one focuses solely on educational practices carried out in spaces organised especially for this purpose – aware of the reductionism inherent in such a focus – then ‘older adult education’ is very recent in Spain. What has existed for over a century in our country is ‘adult education’ and ‘popular education’.

36.2.1 *Adult Education Centres*

Adult education in Spain has never been specifically focused on or limited to the older segments of the population. Under various different names, adult education centres in the country work with persons over the age of 16–18 with the four-fold objective of completing their basic education and furthering their personal development while at the same time helping them to become an active member of society and the labour force. In addition, and more directly related to the subject at hand, the Education Act of 2006 (España 2006), which regulates the general framework of education in the country as a whole, expressly acknowledges that the aim of adult education is “to respond appropriately to the challenges posed by the progressive ageing of the population, ensuring that older individuals have the opportunity to expand and update their skills” (ibid: 17178). And in fact there are older adults among the students at adult education centres. And not only that; starting in the 1980s, with the return of democracy to the country, this network of centres expanded a great deal, with a considerable increase in the number of older adults participating in the educational activities offered there (*Federación Española de Universidades Populares* [FEUP] [Spanish Federation of Popular Universities] 2012). It is interesting to note that in the 2010/11 academic year, 8.2 % of the students enrolled in adult learning or distance learning, in formal education programmes, were over the age of 64 (Ministry of Education, Culture and Sport 2013). Clearly, it is quite a small number: about 38,000 persons out of a total population of 7.8 million Spaniards aged 65 or older. These students participate in activities that range from literacy and basic reading skills to coursework leading to the secondary education diploma. However, we think it is to be expected that most of the older students in these centres feel more drawn to the non-formal courses such as foreign languages, use of information and communication technologies, activities of a socio-cultural nature or courses focused on personal and social development and participation.

Adult learning is permeated by the concept of permanent learning, or lifelong learning. However, the *Action Plan for Lifelong Learning* (Ministry of Education 2011), implemented by the Spanish government in the 2012–2014 period, set priorities related mostly to the adult population lacking the basic skills associated with compulsory education levels or lacking the official accreditation corresponding to their occupation, and also to the population of young people who are having trouble finishing their compulsory education. But with regard to older people, in the context of adult education, very few concrete actions were mentioned, beyond recognising the need to increase the skills of these persons so that society and future generations can benefit from them. From this point of view, it seems that the educational possibilities that adult education offers to older people have not changed substantially over the past decade (Velázquez and Fernández 1999). Older persons are presented as individuals in a situation of risk, and education is presented as the key to improving their chances of social insertion. It seems that in the end the education of the older population is considered the means by which to correct a deficit.

36.2.2 *Universidades Populares*

With respect to popular education as a form of older adult education, one of the best examples in Spain can be found in the *Universidades Populares* (UP) (Popular Universities). The UP are centres, usually operated by the municipality, dedicated to providing popular education and sociocultural activities for adults, with the aim of “promoting the cultural and educational development of citizens so that they are better prepared to participate actively in everything that affects them” (Moreno and Sebastián 2010: 175). Like the adult learning centres, they reappeared in Spain at the beginning of the 80s, with the consolidation of democracy. The UP, which in 2009 numbered 400, are located throughout the country, particularly in small and medium-sized towns, outlying neighbourhoods, rural communities and the industrial belt of large cities (FEUP 2012), and they carry out educational, cultural and social intervention activities mainly within the framework of adult education. The priority of the UP has always been social groups with less basic education or with more difficulties accessing education; their working methodology can be described as “active, group-oriented, participatory, socializing, flexible, ludic, holistic and experience-based” (Moreno and Sebastián 2010: 176). The UP also have older adults among their students.

The Spanish federation of this type of university considers the UP capable of offering older adults, through sociocultural and educational intervention, “spaces in which to engage in social relations, experience personal growth and make the most of their experience” (FEUP 2012: 234). Popular Universities are aware that older adults are mainly deemed as a socially disadvantaged collective of non-productive persons, with diminishing social relationships and few ways to socially project their life experience. Therefore, UP’s objectives regarding older adults focus on broadening their education and cultural knowledge, promoting their access to basic education as a fundamental element of cultural development, increasing their personal autonomy and enabling society to benefit from their wealth of knowledge and experiences. In the end, Popular Universities intend to enhance older persons’ sense of self-worth while preserving elements of popular heritage and traditions.

While adult education centres generally belong to the education system set up by the central government and the country’s 17 autonomous regions and 2 autonomous cities, the UP depend more directly on municipal governments and therefore have an eminently local vocation. Their focal point is culture, in the broad sense of the term, meaning all areas that not only help people to live better but also help them to participate actively in the necessary transformation of society so that such a better life is really possible. Activities in the areas of education, culture and social intervention walk hand in hand in the UP. As for the first area of activity, the efforts of the UP go towards objectives such as helping people to acquire the skills and knowledge necessary for everyday life or a broader and deeper range of cultural knowledge (Moreno and Sebastián 2010: 176).

Hence, what are the achievements of UP, in terms of education, with respect to older adults? The examples are numerous: writing contests, computer courses,

general knowledge courses, memory and mental gymnastics workshops, physical education, etc. And of course there are the educational activities designed for all people, regardless of age, in which older adults can also participate. To clearly illustrate how a UP works specifically with older adults, we will describe one of the most successful and best structured programmes of all those offered by these bodies: *Nuestros mayores activos* (NMA) (Our active elders), an initiative of the Association of Popular Universities of Extremadura. This project is intended to enhance the opportunities for active ageing by older adults in Extremadura, generating and optimizing possibilities for participation by these people. Inaugurated in 2001, as many as 6,000 individuals participate in this programme every year. The programme's originality lies in the fact that it combines sociocultural activities, intergenerational work and ongoing learning. Everywhere that NMA is implemented an active group is founded, comprised of local residents of all ages who want to invest some of their time and energy in designing, planning and managing activities that contribute to the population's well-being. Once the area of action has been defined – the recovery of cultural heritage, for example – the group organises a partnership in the municipality involving all the individuals and groups that wish to take part. As the partnership grows, with more and more people taking part in the programme, with more and more activities of common interest in the community taking place and with increasing awareness of the connection among the people in the community, NMA achieves its goal: the older adults involved learn how to live in such a way that their ageing experience is more satisfactory. NMA is an example of how the UP can provide education through participation and culture, in an experiential and practical manner, placing the interest in better ageing before the chronological age of older adults.

36.2.3 *Aulas de Tercera Edad*

Somewhat similar to the UP are the *Aulas de Tercera Edad* (ATE) (Mature Learning Centres), the third type of body that works in the field of older adult education in Spain. In contrast with the two institutions discussed above, the education offered here specifically targets older adults. In 1978, the Spanish Ministry of Culture, inspired by the Universities of the Third Age founded in France 6 years earlier by Pierre Vellas, developed a mature learning programme. That year, 22 centres undertook the task of promoting culture and education in response to the demands of older adults in these areas. In 2013, the Spanish confederation of these mature learning centres had a membership of about 100 bodies, scattered all over the country. They focus their efforts on helping older adults stay active and up-to-date in a rapidly changing society. To put it briefly, the main objective of these centres is to enhance the general and cultural knowledge of older adults.

In 2008, on the 20th anniversary of the creation of the ATE, many of these centres expressed their conviction that they represent an effective means by which to improve the lives of older adults – on the individual level and as a social group – by

strengthening and expanding their abilities and skills (*Confederación Española de Aulas de Tercera Edad* [Spanish Confederation of Mature Learning Centres] 2008). The ATE work within the framework of ongoing education and believe that a richer experience of culture – understood as knowledge, creation, motivation, tradition and progress – helps older adults to take charge of their lives and to play a more active role in their respective stories. The ATE themselves state that their methodology is based on motivation, on social/cultural activities, dialogue, participation and group-oriented techniques, with multi-disciplinary support by teachers and other professionals (*Confederación Española de Aulas de Tercera Edad* 2008).

If we look, for instance, at the educational activities offered by the ATE of Galicia, which, with more than 35 years of experience, are among the pioneers in Spain, we find that their 1,400 members can participate, after paying a registration fee and an annual activity fee, in workshops and courses on literature, art history, languages, painting, theatre, computers, social skills, memory gym and tai chi, among others. In addition to offering educational activities, some ATE also study and conduct research about ongoing education in adults and issues related to old age. The *Universidad Nacional de Aulas de Tercera Edad* (UNATE) (National University of Mature Learning Centres) provides another interesting example. It is located in Cantabria, in northern Spain. In the academic year 2011/12, it had about 3,000 students aged 50 and older (of whom 81 % were women) and offered 6,000 h of activities in which 77 teachers were involved. UNATE says that its students reflect the new image of older adults: they are individuals with higher levels of education, they are active, motivated, and keen to participate, and they are determined to do everything they can to have a satisfactory life and ageing process (UNATE 2013).

36.2.4 *Programas Universitarios para Mayores*

Spain's most recent initiative in education specifically for older adults is found in the *Programas Universitarios para Mayores* (UPOA) (University Programmes for Older Adults). At the end of the last decade, 53 Spanish universities offered some kind of UPOA, reaching a total of 25,000 students aged 50 or older (Bru 2007). In the academic year 2012/13 the figure had surpassed 50,000 students (Vila 2013), divided unevenly among about 60 Spanish universities.

Initially conceived as a social service of a cultural and educational nature, aimed at persons who were not able to study at university in their day, over time the UPOA have come to focus more on lifelong learning programmes. Little by little, the UPOA have vindicated their differential identity, in terms of both content and form, practicing a type of older adult education different from that of adult education centres, the Popular Universities and the ATE (Bru 2007; Velázquez and Fernández 1999). It is said that the UPOA, among other unique characteristics, benefit from the pre-existing academic organization, effectively connect learning to research and have a vocation for international projection (Bru 2007). In fact, in 2002 various universities offering this type of programme proposed a framework model that lays

down the basic conditions of a UPOA. The specified conditions include: minimum duration of three academic years, with a total of between 400 and 450 h of course-work; classes organised into compulsory subjects, elective subjects and complementary activities; a stable curriculum taught primarily by university professors; and the promotion of research. At the 8th Spanish UPOA Conference in 2013, voices could still be heard lamenting the lack of accreditation and recognition of such programmes by the country's educational authorities, one of the most pressing concerns of those who are directly in charge of them.

In contemporary times, the principal purpose of these educational opportunities aimed at older adults is not to provide professional training but rather to improve these individuals and their surroundings, by ensuring access to education at all stages of life, and doing so within the university system. As mentioned above, the emphasis has shifted, with less importance being placed on the programmes' social nature and more on their educational and formative characteristics. Evaluations have revealed a high degree of satisfaction among students and professors involved in the UPOA. Students find that these programmes help them to satisfy needs that are more expressive (related to the pleasure of learning for learning's sake, to personal satisfaction and development) than instrumental, which is the case when the educational experience has a purpose that goes beyond the learning itself: to meet people, to obtain a degree or to use what is learned to solve problems (Villar et al. 2010b). The professors find particular satisfaction in the active, interested and appreciative attitude shown by the students enrolled in UPOA (Villar et al. 2010a).

36.3 Discovering Older Adult Education

Up to this point, this chapter has described the ways that older adult education currently exists in Spain. In the following paragraphs, it puts forward some reflections which hopefully will promote research in a field in which almost everything remains to be explored. Beyond what people say is being done, what is actually being done in older adult education in Spain? In harmony with our previous papers on older adults (Sáez 2003, 2005a, b, 2010; Sánchez 2005; Sánchez and Sáez 2007), this chapter concludes with three considerations.

First, in general older adult education is designed in accordance with the features and constants of the formal education system, which foments a specific type of education oriented around and justified by age (preschool, kindergarten, primary school, secondary school, university, and so on). However, at this advanced stage of pedagogical research it is known that there is no such thing as a specific education that corresponds to a particular chronological age, since age indicates only the time that has passed since a person was born but little about the needs and desires of that person. If the signifier *older adult education* continues to be used to refer to a type of education oriented just around age – whether it is 55, 60 or 65 – then the education of older adults cannot be expected to unleash all of its potential. Chronological age as main criteria to organize older adult education would be a reductionism.

Neither ageing consists solely in the accumulating of years, nor is chronological age the only characteristic to convey the temporal dimension of human life completely.

Second, it is pertinent to question the relationship between ageing and education? Exploring topics related to later life or addressing ageing from the perspective of education is by no means the exclusive terrain of older people; topics related to the passage of time, health, the acquisition of knowledge and skills that allow us to stay in touch with our times and be able to face the difficulties of life are pertinent at any age (childhood, youth, adulthood...). In this regard, we find regrettable the positions that attempt to associate older adult education with the process by which to “maintain, delay or minimise the losses of the ageing process” because they hold that “the conclusion and basic idea of Gerontological Education is that educational processes for older adults need not focus so much on creating, developing or strengthening skills, habits, abilities or even knowledge” (Rodríguez et al. 2010: 231) but rather on preventing the ailments of old age. This approach leads to a negative pedagogy, one that erroneously assumes that education should be designed to compensate for the deficits of a person, instead of working towards the expansion of skills, abilities and knowledge that older adults can use, according to their interests and needs, to improve their lives in the direction they choose.

Finally, some of Spain’s educational projects targeting older adults seem to define themselves and at least theoretically orient their activities around the age of the students, their deficiencies and the contents they supposedly should learn. But if we wish to conceive of and design a programme based on the ideas of potential and multiplicity, then the older adults themselves need to play a more active role in their educational process. What we mean is that it is important to focus on what can really be done by an older adult, who is not monolithic, unchanging and identical to any other older person, nor does he or she form part of any prior category or label that announces how, where, when and why that person should learn. To continue addressing older adult education only in terms of the identity that supposedly characterises older people belies a lack of pedagogical knowledge that the programmes end up paying for, when they find a diversity of voices, opinions, perceptions and ways of seeing that dismantle all prejudices and stigma, any pre-existing category with which older adult education tends to be justified.

It is noteworthy that while children and young people are defined as educational actors according to certain identifying categories – mainly age – that determine which type of learning should be applied, and the education of adults is pervaded by institutional imperatives or market pressures, this is not the case of older adult education. The latter is not subject to any pressure or imperative other than that of fulfilling the wish of these individuals to learn. Indeed, this is the great distinguishing feature that sets older adult education apart from the education of any other group: if these people decide to seek education, they do so because of their own decision to learn, with no other motives except the wishes that prompt them to act (Sáez 2010). And to date, in the older adult education field in Spain, not enough value has been given to the educational potential lying within the power to decide for oneself. In Spain, many of the theoretical foundations of older adult education are in fact based

on an ingenuous technocratism of a positivist and behaviourist nature, loaded with applications and executions, that largely ignore the numerous variables and dimensions associated with education as a decisive cultural resource and yet bases itself on the same theories as the ones used to justify the education of children, youth or adults. The programmes and projects offered to older adults wishing to learn illustrates the hegemony of the discipline's logic in the same way that this logic, save rare exceptions, predominates in the rest of the educational system.

Generally speaking, the education of older adults in Spain is effectively buried in a mimetic routine and lacks a truly innovative educational model. Therefore, one of the challenges before us is to stimulate and sustain research that sheds light on what is really being done in this type of education, on how, when, where and why it is being carried out, on who the true beneficiaries are and on the goals being reached by the older adults, in accordance with what these persons expect from their learning experience. We need to confirm the materialisation, or lack thereof, of the commitments and promises that the initiatives described in these pages claim to be making on behalf of this type of education.

Acknowledgement The Department of Sociology in the University of Granada supported translation into English of this chapter.

References

- Bru, C. (2007). Older adults university programmes in Spain: A socio-educational and political challenge in the context of lifelong learning. In V. Bissland & B. McKechnie (Eds.), *Proceedings of the international conference on learning in later life* (pp. 28–38). Glasgow: University of Strathclyde.
- Confederación Española de Aulas de Tercera Edad. (2008). *Manifiesto de Santiago de Compostela* [Manifiesto for Santiago de Compostela]. www.fadaum.org/pdf/libroblanco/manifiesto_aulas.pdf. Accessed 15 Nov 2013.
- España. (2006). *Ley Orgánica de Educación* [Spanish Organic Act on Education]. <http://www.boe.es/boe/dias/2006/05/04/pdfs/A17158-17207.pdf>. Accessed 18 Nov 2013.
- Federación Española de Universidades Populares. (2012). *Las universidades populares. Bases conceptuales y marco general de programación 2012–2015* [Popular universities. Conceptual foundations and general programming framework 2012–2015]. Madrid: Federación Española de Universidades Populares.
- Instituto Nacional de Estadística. (n.d.). *Estadística del Padrón Continuo a 1 de enero de 2013* [Continuous census statistics as of January 1, 2013]. Madrid: INE. <http://www.ine.es/jaxi/tabla.do?path=/t20/e245/p04/a2013/10/&file=00000002.px&type=pcaxis&L=0>. Accessed 3 Oct 2014.
- Lenoir, R. (1993). Objeto sociológico y problema social [Sociological object and social problem]. In P. Champagne, R. Lenoir, D. Merllié, & L. Pinto, *Iniciación a la práctica sociológica* (pp. 57–102). Madrid: Siglo XXI.
- Ministry of Education. (2011). *El aprendizaje permanente en España* [Lifelong learning in Spain]. Madrid: Secretaría de Estado de Educación y Formación Profesional. https://sede.educacion.gob.es/publivera/descargas.action?f_codigo=14856&codigoOpcion=3. Accessed 15 Nov 2013.

- Ministry of Education, Culture and Sport. (2013). *Las cifras de la educación en España. Curso 2010–2011* (Edición 2013) [Spanish education in figures. Academic year 2010–2011 (2013 edition)]. Madrid: MECED. <http://www.mecd.gob.es/servicios-al-ciudadano-mecd/estadisticas/educacion/indicadores-publicaciones-sintesis/cifras-educacion-espana/2013.html>. Accessed 15 Nov 2013.
- Moreno, P. L. & Sebastián, A. (2010). Las universidades populares en España (1903–2010) [Popular universities in Spain (1903–2010)]. *CEE Participación Educativa*, Número Extraordinario, 165–179.
- Sérez, J. (2011). Demografía, envejecimiento y crisis. ¿Es sostenible el Estado de Bienestar? [Demography, ageing, and crisis. Is the welfare state sustainable?]. In Federación de Cajas de Ahorros Vasco-Navarras, *El Estado de bienestar en la encrucijada: nuevos retos ante la crisis global* (pp. 47–62). http://www.fcavn.es/Castellano/Publicaciones/Ekonomi_Gerizan/18.asp. Accessed 15 Nov 2013.
- Rodríguez, A., Mayán, J. M., & Gutiérrez, M. C. (2010). Intervención pedagógica en gerontología [Pedagogical intervention in Gerontology]. In A. Cabedo (Coord.), *La educación permanente: la Universidad y las personas mayores* (pp. 231–262). Castellón: Universitat Jaime I.
- Sáez, J. (Coord.). (2003). *Educación y aprendizaje en las personas mayores* [Older adult education and learning]. Madrid: Dykinson.
- Sáez, J. (2005a). La intervención socioeducativa con personas mayores: Emergencia y desarrollo de la gerontagogía [Socioeducational intervention with older adults. Emergency and development of gerontagogy]. In M. da Graça & J. Veloso (Eds.), *University programmes for senior citizens: From their relevance to requirements* (pp. 19–83). Porto: Faculdade de Letras da Universidade do Porto.
- Sáez, J. (2005b). Gerontagogía. Intervención socioeducativa con personas mayores [Gerontagogy. Socioeducational intervention with older adults]. In S. Pinazo & M. Sánchez (Eds.), *Gerontología, actualización, innovación y propuestas* (pp. 289–336). Madrid: Pearson Educación.
- Sáez, J. (2010). La educación de personas mayores: de la lógica disciplinar a la lógica profesional [Older adult education: From the disciplinary logic to the professional logic]. In A. Cabedo (Coord.), *La educación permanente: la Universidad y las personas mayores* (pp. 263–302). Castellón: Universitat Jaime I.
- Sánchez, M. (2005). Los programas universitarios para mayores en España. Algunas reflexiones para aprender de los errores ajenos [University programmes for older adults in Spain. Some reflections to learn from other people's mistakes]. In M. da Graça & J. Veloso (Eds.), *University programmes for senior citizens. From their relevance to requirements* (pp. 1–18). Porto: Faculdade de Letras da Universidade do Porto.
- Sánchez, M. & Sáez, J. (2007). Bases pedagógicas de la educación de las personas mayores [Pedagogical foundations of older adult education]. In A. Escarbajal de Haro (Coord.), *Educación y personas mayores* (pp. 13–63). Murcia: Diego Marín.
- Velázquez, M. & Fernández, C. (1999). Aprendizaje universitario y personas mayores. El Aula de la Experiencia de la Universidad de Sevilla [University learning and older adults. The *Aula de la Experiencia* in the University of Seville]. *Escuela Abierta*, 3, 33–54.
- Vila, A. (2013). La formación: Un valor en expansión entre los mayores españoles [Training: An expanding asset for Spanish older adults]. *Entre Mayores*. <http://www.entremayores.es>. Accessed 15 Nov 2013.
- Villar, F., Celdrán, M., Pinazo, S., & Triadó, C. (2010a). The Teacher's perspective in older education: The experience of teaching in a university for older people in Spain. *Educational Gerontology*, 36(10–11), 951–967.
- Villar, F., Triadó, C., Pinazo, S., Celdrán, M., & Solé, C. (2010b). Reasons for older adult participation in university programs in Spain. *Educational Gerontology*, 36(3), 244–259.
- Universidad Nacional de Aulas de Tercera Edad. (2013). *UNATE. La Universidad Permanente. Memoria 2011–2012*. (UNATE. The permanent university. Memory 2011–2012). Santander: UNATE.

Chapter 37

Taiwan

Yi-Yin Lin and Chin-Shan Huang

The development of educational gerontology in Taiwan has its own sociocultural background. The culture of Taiwan is perceived as having both a traditional and modern dimension due to its societal roots in Confucianism as well as the influence of Western cultures and its specific geographic location. Additionally, the rapidly increasing ageing population is a primary impetus. Historically, in the mid-twentieth century, Taiwanese society was still largely rural, agricultural, and young; only about 2.5 % of Taiwan's population was over 65 years of age. However, with rapid industrialization and modernization, the age structure of the population of Taiwan has experienced a critical change. (See further explanation later in this chapter).

With the impetus of the growing ageing population and cultural values – respect for the aged and their wisdom – provisions and legislation involving educational gerontology have been developed and effectively enacted in Taiwan over the last 30 years. Initially, the government considered education for older adults as a way to achieve social welfare. With the trend toward lifelong learning, Taiwan's government has employed this perspective to provide education for older adults.

The purpose of this chapter is to briefly provide a review of the past, present and future of older adult education/learning in Taiwan. At the end of chapter, a “successful” initiative of older adult is presented consistent with current policies.

Y.-Y. Lin (✉)

Gerontology Institute, Georgia State University, Atlanta, GA, USA

e-mail: ylin24@gsu.edu

C.-S. Huang

Department of Adult and Continuing Education, National Chung Cheng University,

Chia-Yi, Taiwan

e-mail: aducsh@ccu.edu.tw

37.1 The Past

37.1.1 *The Development of Older Adult Education in Taiwan*

Huang (2010) traced the development of educational gerontology in Taiwan and categorized it into three stages:

Initial Stage (Before 1993) Little attention was given to the development of educational gerontology and only a few educational activities were provided by social-service departments. The education for older adults at this stage was viewed from a welfare perspective instead of an educational/learning perspective.

Formative Stage (1993–2003) Some scholars, experts, and practitioners started involving themselves in the development of educational gerontology since more than 7 % of the population in Taiwan reached 65 years old or above in 1993 and also since two graduate institutes of adult education were established.

Expansive Stage (2003–Present) The development of older adult education was greatly advanced when a graduate institute of educational gerontology was established in Taiwan and the government released a new educational white paper that focused on older adult education, entitled *Toward the aged society: Policies on education for older adults* (Ministry of Education 2006). This paper represented the value of learning privileges for the ageing population and initiated the legislative issue of justice in older adult education. According to Huang (2010), five major trends advanced the development of older adult education in Taiwan.

Changing Demographics Changing demographics had a great impact on the development of educational gerontology in Taiwan. In the mid-twentieth century, society in Taiwan was still largely rural, agricultural, and young, so the percentage of Taiwan's population over 65 years old was only about 2.5 %. However, with rapid industrialization and modernization, the age structure of the population of Taiwan has experienced a critical change. In 1993, more than 7 % of the population was 65 years old or over, so Taiwan became a so-called *ageing society*. It was estimated to grow to 14 % (*aged society*) by 2017 and 20 % (*super-aged society*) by 2025 (Ministry of Interior 2013). Thus, the transformation of Taiwan from an ageing society to aged society would take about 25 years, but it would only take 8 years to go from an aged to super-aged society. Copper indicated that “Taiwan is currently experiencing the ageing phenomenon faster than Japan Taiwan, in fact, has aged faster than almost any other country in the world” (1999, p. 82). With the increase of the population of older people, more and more attention has been given to the development of educational gerontology.

Political Imperatives The central and local governments made prominent contributions to the development of educational gerontology in Taiwan. Briefly speaking, three important policies directly influenced the studies and practices of educational gerontology. First, in 1998, the white paper entitled *Heading for a Learning Society*

(Ministry of Education 1998) was announced by the Minister of Education, and the same year was also proclaimed The Lifelong Learning Year in Taiwan. Second, in 2002, the Act of Lifelong Learning was officially passed. Under these two political imperatives, the Taiwan government advocated for the concept of lifelong learning and the vision of a learning society. Based on the concept and vision, the government also took some initiatives to promote the development of educational gerontology, though it was not yet the main focus of these two political imperatives. Finally, in 2006, the announcement of the white paper entitled *Toward the aged society: Policies on education for older adults* led to a remarkable growth in educational gerontology. Therefore, the above three political imperatives have played an important role in the development of educational gerontology in Taiwan, and both central and local governments were forced to put emphasis upon the development of educational gerontology.

Social Development It was not until the 1970s that Taiwan became an urbanized and industrialized country and the lives of elders in Taiwan were profoundly affected by the rapid development of urbanization and industrialization. Many older adults in Taiwan were mostly involved in farming during their lives; but now the world in which they lived is no more. However, it was very difficult for them to adjust themselves to the modern, urbanized, and industrial society, which did not exist before in the history of Taiwan. Therefore, the pressure to provide various services and activities to help older people adjust to the modern society forced Taiwanese central and local governments to actively intervene in this public issue. However, the knowledge of and skills in gerontology and educational gerontology in Taiwan were insufficient to satisfy this purpose, because the demand for the provision of professional services has gradually become serious. Thus, many universities and colleges, as mentioned above, took the initiative in establishing departments or graduate institutes related to gerontology or educational gerontology for training and educating students from diverse backgrounds including nurses, teachers, social workers, and foundation directors as professional gerontologists.

Academic Extension The impetus from academics made dramatic progress in the development of educational gerontology in Taiwan. Educational research in Taiwan has mainly focused on the study of general education for a long time, and studies of adult education and educational gerontology have been marginalized in the field of educational research. Until the graduate institutes of adult education and educational gerontology were established, research into older adult education was developed gradually. Specifically, in 1993, two Graduate Institutes of Adult Education were established at the National Chung Cheng University and the National Kaohsiung Normal University and focused on the studies and practices of adult and continuing education. Although the studies and practices of educational gerontology were not highlighted in the early stages of these two graduate institutes, some scholars in these two graduate programmes took the initiative in doing research on educational gerontology and, therefore, triggered the attention of academia in regard to the development of educational gerontology at the same time. In 2003, the establishment of the Graduate Institute of Educational Gerontology at the National

Chung Cheng University marked a new era in the development of educational gerontology in Taiwan. This Graduate Institute not only focused on the studies and practices of educational gerontology, but also promoted the development of theory in educational gerontology. With the changes of time, the focus of educational studies has extended from children to adults and, now, further to older adults.

International Influence Taiwan has been influenced by international tendencies because it is a small island in the western Pacific Ocean; specifically its politics, economics, academic research, and the development of educational gerontology is no exception. For instance, David Peterson, the famous educational gerontologist, visited Taiwan in 1993. Scholars such as Professor Ronald J. Manheimer from the North Carolina Center for Creative Retirement (USA), Dr. Matthew Kaplan from the Beth Johnson Foundation (UK), Professor Atsushi Makino from the University of Tokyo (Japan) and Professor Brian Findsen from the University of Waikato (New Zealand) were also invited to share their knowledge and experience about the studies and practices of educational gerontology in Taiwan from 2007 to 2013. Since educational gerontology has increasingly become a global issue, contributions from international scholars significantly enhanced the professional development of educational gerontology in Taiwan.

37.1.2 The Contributions of Organizations, Associations and Scholars

The development of older adult education in Taiwan has been contributed to and emphasized both by government and non-governmental organizations. Non-governmental organizations play the role as frontline players whether in practice or research in older adult education. With appeals from non-governmental organizations, the government plays the prominent role of a supporter to promote older adult learning in Taiwan by releasing legislation. Among non-governmental organizations, some directly provide the educational activities for older adults, while some focus on advocating the importance of educational gerontology.

Organizations The earliest one that provided organized activities for Taiwanese older adults is the Taiwan Taipei Young Women's Christian Association (YWCA) in 1978. It founded a learning organization called the Evergreen Club to provide educational activities, including leisure and skill classes, for older adults. Based on the experience of the Evergreen Club, the first University for Older Adults, named Chang Ching Shyue Yuan in Taiwan, was founded by the Social Affairs Bureau of Kaohsiung City Government in 1982 (Huang 2005). Their model became an example for the Universities for Older Adults in Taiwan.

Associations Some associations which contributed to advocating for the older adult learning made great advances in educational gerontology in Taiwan. Before 1993, few studies or projects were focused on adult education or educational

gerontology and no academic programmes concentrated on adult education or educational gerontology among the universities. Therefore, some scholars from different fields of education who were interested in adult education or educational gerontology joined together to organize academic associations. For example, the Association of Community Education (ACE) was founded in 1982, and the Association of Adult Education (AAE) in 1990. Their purpose was to discuss and advocate for the importance of adult education or educational gerontology in Taiwan. Therefore, they not only focused on the study of community education and adult education, but also hosted conferences and published books regarding educational gerontology. In addition, some training programmes regarding education for older adults were provided by these two organizations. More recently, the Taiwan Active Aging Association (TAAA) was established in 2010 as the first organization focusing on conducting research and promoting programmes for older adult education in Taiwan.

Scholars In addition to the contribution of organizations, the growth of older adult education in Taiwan also relied on some scholars' individual interests or concerns. They expressed their interests by publishing books, conducting research projects and opening classes. For example, Professor Fu-Shun Huang published three books entitled *Learning in later life* in 2004, *International educational gerontology: A comparative study* in 2007, and *Education for older adults* in 2008 that provided an organized literature regarding older adult learners in Taiwan.

Importantly, to advocate the practice of older adult learning, Professors Meng-Ching Hu and Hui-Chuan Wei led a team from National Chung Cheng University to host workshops at four different areas in Taiwan to provide the training and consulting service of older adult learning programs. Topics of the workshop included the design of programmes for older adults and the learning needs and interests of elders in Taiwan. Furthermore, Professor Chin-Shan Huang published a series of articles since 2002 to explore the development of older adult education from a historical and philosophical perspective and his works established a systematic literature of educational gerontology in Taiwan.

37.2 The Present

37.2.1 *Current Development of Older Adult Education in Taiwan*

Programmes for older adults were promoted in Taiwan after the government released the Act of Welfare for Older Adults in 1980; sequentially, plans, acts, and white papers were also produced that triggered the burgeoning of programmes for older adults ever since. Importantly, in 2006, due to Taiwan's rapidly ageing population – one of the most rapidly ageing populations in the world (Council for Economic Planning and Development 2011) -the Ministry of Education released a white paper

entitled *Toward the aged society: Policies on education for older adults* as the current major legislation of older adult education in Taiwan. Due to the fact that the new generation of older adults with higher education are generally more active and confident than older generations (Huang 2010), the perspective of *active ageing* was utilized in white papers in order to guide the current projects and programmes for older adult learning in Taiwan. Furthermore, in order to respond to changing family structures and cultural norms in Taiwan, enhancing intergenerational relationships became the key strategy when designing programmes for older adults. Overall, the implementation of older adult education in Taiwan could be categorized into three main approaches (Lin and Huang 2013), discussed below.

37.2.2 *Community-Based Programmes for Older Adult Learners*

Chang Ching Shyue Yuan (CCSY) The University for the Third Age in Taiwan is one of the most important and the earliest services and support mechanisms for older adult learners in Taiwan. It was established or funded by the social service departments of local governments, and tended to run their own activities without any assistance from local universities or colleges. Most of the programmes in CCSYs are leisure-oriented, and instructor-centred lectures are the method most often used by the teachers in the classrooms. Currently, in total, 265 CCSYs were established in Taiwan by the end of 2006 (Chu 2011).

Learning Resource Centre for Active Elderly (LRCAE) In order to promote older adult education in Taiwan, the Ministry of Education made a systematic effort to launch LRCAEs in every town in Taiwan based on the 2006 White Paper. Currently, LRCAEs are the most organized and multiple educational-oriented settings for older adult learners provided by Taiwan's government. They are usually combined with existing units, including senior centres, nonprofit organizations, community development associations, schools, etc. Therefore, every LRCAE offers its own contributions to learning activities – one LRCAE, one approach. The Chinese name of LRCAE (Learning Resource Centre for Active Elderly) is “樂齡 (Le Ling)”, which derives from a respectful name given to older adults in Singapore and means “learning for happiness to forget age.” Currently, around 225 LRCAEs have been established throughout Taiwan (Ministry of Education 2013a, b).

A consulting team of experts led by Professors Meng-Ching Hu and Hui-Chuan Wei was established and administered by the Department of Adult and Continuing Education at National Chung Cheng University to provide development, training, consultation, coordination, and evaluation for each LRCAE. Furthermore, overseen by this team of experts, four regional consulting teams were also assembled to integrate the LRCAEs in every town. A structure to implement the endeavours of older adult education by the Ministry of Education is as follows (Fig. 37.1):

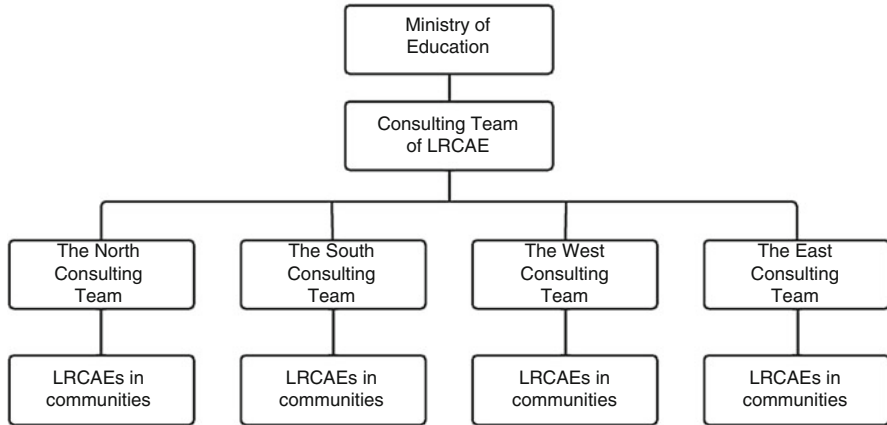


Fig. 37.1 The structure for the implementation of the consulting groups and the LRCAEs (Adapted from the Ministry of Education 2010)

University-Based Programmes for Older Adult Learners Following the suggestion of the white paper propositions, the Ministry of Education launched a university-based programme in 2008. This programme offers a short-term or Elderhostel approach to learning activities on college campuses, called *Le Ling Da Shyue*. The idea for this learning approach was derived from the Elderhostels in the United States. Older adults who participate in this programme can access academic resources and have opportunities to interact with university students. Also, the classes in this programme can utilize the facilities and teachers from the universities. In 2012, there were 87 colleges and universities taking part in this programme, compared to only 13 universities in 2008 (Ministry of Education 2012).

Intergenerational Programmes The intergenerational approach acts as a principal strategy for design programmes for older adults in Taiwan. Government also funded a series of intergenerational programmes, and the family education centres in each county play an important role in developing and encouraging the programmes in Taiwan. These programmes include ageing education in kindergarten and elementary schools, Toy Shop Clinics and intergenerational theatrical performances. Most importantly, from 2010, the Ministry of Education launched Grandparents Day in Taiwan on the fourth Sunday of August, to promote and strengthen filial piety and intergenerational relationships in families.

37.2.3 *Reflection on the Current Policies and Practices of Older Adult Education*

Throughout Taiwan, there are currently thousands of programmes regarding older adult learning. However, with the current socioeconomic climate, the growing economic gap, and an increasingly ageing society with a growing number of persons

diagnosed with chronic disabling conditions, some thoughts and reflections on the current policy and programmes, in terms of the practice of social justice and equality, have emerged.

The first argument regards the appropriateness of the current paradigm – active ageing – whether utilized in guiding implementation of older adult education and how it will affect the equity of both healthy and disabled elders. In analyzing current programmes in Taiwan, we note that most emphasize healthy older adults. Specifically, the white paper provides limited learning opportunities and projects for marginalized seniors. However, in order to truly carry out social justice and equality in educational gerontology, it may be necessary to go beyond the framework of the successful/active ageing to embrace issues of ailing elders. Those older adults who have already become disabled to some extent – so that they have no chance to attain the defined state of “successful ageing” – could be included and considered in legislation and programmes as well. Overall, we argue that if we did not recreate praxeological plans for the marginalized elders, only those healthier and mainstream seniors become potential winners. Those disabled and frail seniors might become losers or forgotten with the implementation of the current policy.

Next, we might rethink if the current model – a centralized and hierarchical model in the implementation of older adult education – is a sustainable approach for the future. The new generations of older adults are more educated, active, and confident than the previous older generations (Huang 2010). It has been suggested that the best policy of the government is to play a less active role in providing services to older people (Huang 2010). We further suggest that by acknowledging the learning rights to older adults, the specific needs of older adults in certain communities could also be responded to and their lower motivation to learn might be enhanced. Therefore, it is important that educators and programme designers encourage older adult education through the empowerment approach, that is, by emphasizing their autonomy and freedom, and understanding their true voices. These are the current issues that challenge us.

37.3 The Future

Based on the above discussion, we suggest that taking a more critical approach might lead the way to achieve social justice in older adult learning as suggested by Minkler (1996) and Moody (1988). Here are plans for what older adult learning might look like in the next 10 years in Taiwan.

Expanding Perspectives to Embrace Disabled Ageing in Policy First, to include older adult learners experiencing non-healthy/mentally disabled ageing, the researchers took suggestions from Naue and Kroll (2010) who claim that future ageing policies should include not only ageing issues but also disabilities. Thus, the current authors argue that policies and practices for educational gerontology have to emphasize and effectively include older people with long-term conditions, demen-

tia, and other disabilities. Furthermore, as suggest by Naue and Kroll (2010), it is important to differentiate between older adults ageing *with* a disability and those aging *into* a disability when we provide learning programmes because these older adults have different life experiences and social identities.

Connecting with Non-governmental Organizations (NGOs) Furthermore, in order to reduce the government’s role toward a decentralized model of older adult education, the researchers suggest strengthening the connection between learning centres and enterprise or nonprofit organizations to encourage NGOs to support learning projects of older adults. In Taiwan, many resources are furnished by foundations, enterprises, and NGOs; therefore, it is important to advocate for their value to older adult learning.

Empowering by Improving Digital Ability In an informational society, having skills in information and communication technologies is important for older adult learners; otherwise, they would feel excluded from the growing information society. Most importantly, having digital ability is also useful for empowering frail or isolated older adults. For example, through learning digital skills, they are able to connect to the world and their families. Furthermore, via social media, they may be empowered to express themselves through networking.

37.3.1 Opening Higher Education for Older Adult Learners

This strategy refers to older adults’ enrolment as normal students in universities or colleges. Current higher education is usually dominated by full-time, residential youth with little voice or value given to other age groups, especially those who are the most different from young students – older adult learners (McAllister 2010; Finsen 2012). However, with the increasing number of non-traditional students in higher education, whether in Taiwan or other countries, creating a safe space for older adult learners and the institutions playing a role in promoting leadership for all learners becomes important. For example, the University of Georgia in the USA, based on the provisions of the Georgia constitution, has established rules to provide persons 62 years of age or older free enrolment on campus to encourage older adults back into school ([USG] 2012).

37.3.1.1 A “Successful” Initiative of Older Adult Learning in Taiwan

An intergenerational approach is a popular strategy used when providing programmes for older people in Taiwan. This approach successfully promotes older adult learning and it shines a light on many touching stories. Here is an example from one of the LRCAEs showing how the intergenerational approach was used in the programme to improve the relations between young and older generations and more importantly, to create a stage to let elders share their life stories and wisdom with younger generations.

Madou LRCAE was selected by the Ministry of Education as one of the exemplary LRCAEs in Taiwan which is located at Tainan city in southern Taiwan. Led by the Director, Mrs. Chang, Madou LRCAE's unique learning programmes for older adults derived from local special fruit – citron and local folk culture – the Twelve Pochie Folk Art. The programmes include the Pochie 8th team, the Yochan Opera Troupe, and a door-to-door delivery model. These programmes feature in bringing young and old generations together through opera and dance. Specifically, the Yochan Opera Troupe is composed of community elders aiming to “act out” their life stories through opera. “Turkey Grandma” in particular is one of the famous operas that touched many school pupils and teachers when the team performed in elementary schools around 2010. The script of Turkey Grandma is based on a real life story of an older woman who attended the Madou LRCA and it describes how a little girl helped her family breed turkeys while taking care of her siblings in former days of agricultural society. The director, Mrs Chang, was enamoured by the story and wrote it as a script. Furthermore, she encouraged members to “act out” this story and share their life experience with school pupils to teach them more about their elders and understand life in earlier days. Now the Yochan Opera Troupe not only performs for local schools, but also for other county's children, and continues to warm hearts by “acting out” their life stories to improve intergenerational relationships.

Alongside the opera, Madou LRCAE also developed a door-to-door delivery learning model to market learning programmes for elders. With this approach, learning activities can be delivered to every corner of the community where elders might gather to advocate the advantages and happiness of learning.



Note. “Turkey Grandma”. The story and picture adapted from Madou LRCAE website (Madou LRCAE 2013)

References

- Chu, N. H. (2011). The policy agenda and vision of older adult education in Taiwan. In H. C. Wei (Ed.), *Policy and practice in older adult education* (pp. 1–25). Taipei: Wu-nan Books (Chinese).
- Copper, J. F. (1999). *Taiwan: Nation-state or province?* (3rd ed.). Boulder: Westview.
- Council for Economic Planning and Development. (2011). *Aging population*. Retrieved from <http://www.cepd.gov.tw>
- Findsen, B. (2012). Engagement of older adults in higher education: International perspectives from New Zealand and Scotland. *Adult Learner: The Irish Journal of Adult and Community Education*, 13–26.
- Huang, F. S. (Ed.). (2004). *Learning in later life*. Taipei: Wu-Nan Books (Chinese).
- Huang, C. S. (2005). The development of a university for older adults in Taiwan: An interpretive perspective. *Educational Gerontology*, 31, 503–519.
- Huang, F. S. (Ed.). (2007). *International educational gerontology: A comparative study*. Taipei: Wu-Nan Books (Chinese).
- Huang, F. S. (Ed.). (2008). *Education for older adults*. Taipei: Wu-Nan Books (Chinese).
- Huang, C. S. (2010). The development of educational gerontology in Taiwan: An interpretive and critical perspective. *Educational Gerontology*, 36, 968–987.
- Lin, Y. Y., & Huang, C. S. (2013). Policies and practices in educational gerontology in Taiwan. *Educational Gerontology*, 39, 228–240.
- Madou LRCAE. (2013). Turkey grandma. *Madou LRCAE*. Retrieved November 10, 2013, from <http://moe.senioredu.moe.gov.tw/front/bin/ptdetail.phtml?Part=11090021&Rcg=36>
- McAllister, C. (2010). “This is the beginning of my life educationally”: Older (50+ Years) working class adults’ participation in higher education in Scotland, through the lens of critical educational gerontology. *International Journal of Lifelong Education*, 29, 547–563.
- Ministry of Education. (1998). *Heading for a learning society*. Taipei: Ministry of Education (Chinese).
- Ministry of Education. (2006). *Toward to aged society: Policies on education for older adults*. Taipei: Ministry of Education.
- Ministry of Education. (2010). *Overview of learning resource centre for active elderly*. Retrieved from <http://moe.senioredu.moe.gov.tw/front/bin/ptlist.phtml?Category=63>
- Ministry of Education. (2012). *Le ling da shyue* [Elderhostel in Taiwan]. Retrieved from <https://moe.senioredu.moe.gov.tw/front/bin/ptdetail.phtml?Part=10100026&Category=68>
- Ministry of Education. (2013a). *Overview of learning resource centre for active elderly*. Retrieved from <https://moe.senioredu.moe.gov.tw/ezcatfiles/b001/img/img/289/100607353.pdf>
- Ministry of Education. (2013b). *Le ling-ing*. Retrieved from <https://moe.senioredu.moe.gov.tw/ezcatfiles/b001/img/img/291/707143116.pdf>
- Ministry of Interior. (2013). *White paper of population policy: The trends of low birth rate, aging and immigration*. Retrieved from <https://moe.senioredu.moe.gov.tw/ezcatfiles/b001/img/img/319/161755083.pdf>
- Minkler, M. (1996). Critical perspectives on ageing: New challenges for gerontology. *Ageing and Society*, 16, 467–487.
- Moody, H. R. (1988). Toward a critical gerontology: The contributions of the humanities to theories of aging. In J. E. Birren, V. I. Bengston, & D. E. Deutchman (Eds.), *Theories of aging* (pp. 19–40). New York: Springer.
- Naue, U., & Kroll, T. (2010). Bridging policies and practice: Challenges and opportunities for the governance of disability and ageing. *International Journal of Integrated Care*, 10(12), 1–7.
- USG. The University System of Georgia. (2012). *Persons aged 62 or over*. Retrieved from <http://www.usg.edu/policymanual/section4/C328/>

Chapter 38

Tanzania

Philemon A.K. Mushi

38.1 The Context of Adult Learning

38.1.1 *The Economic and Social Cultural Context*

Country Profile Tanzania is a multi-party state located in East Africa with a total area of 945,087 square kilometres including the islands of Zanzibar. It borders the Indian Ocean on the east, Kenya on the north, Uganda, Rwanda and Burundi on the north-west, the Democratic Republic of Congo (DRC) on the west, Zambia on the south-west and Malawi and Mozambique on the south. Tanzania, previously Tanganyika, was colonized by Germany and Britain between 1890 and 1961 and united with Zanzibar in 1964 to form the United Republic of Tanzania (URT). The total population is 44,928,923 million (21,869,990 males and 23,058,933 females) (NBS 2012). The ethnic groups in mainland Tanzania constitute 99 % Africans, mainly of Bantu origins with more than 130 tribes, and 1 % consisting of Asian, European and Arab. In Zanzibar the ethnic groups include Arab, African, and mixed Arab. The vast majority of the population lives in rural areas engaged in peasant subsistence farming.

The total number of the older population (60 years and above) is 1.4 million (4 %), and is expected to increase to 8.3 % by the year 2050 (URT 2003). The majority of older people belong to the poorest and most vulnerable groups; they live in the rural areas under the constraints of poverty and disease, the conditions which are more prevalent in the rural areas than urban. Life expectancy at birth among men is 59.5 years and for women is 62.1 years. Although older women live longer than

P.A.K. Mushi (✉)
Educational Foundations Management and Lifelong Learning, University of Dar es salaam,
Dar es salaam, Tanzania
e-mail: pakmushi@yahoo.com

older men, they are affected by ageism and sexism; for instance, they are denied the right to inherit and own property and to participate in decision-making processes on issues which are of their concern, their clan and community. In some places, older women have been raped and tortured to death on the grounds of superstition.

38.1.2 Origins and Growth of (Older) Adult Learning/ Education

Adult education/learning in Tanzania has evolved through a series of phases in an attempt to achieve economic and social objectives. The first phase, the pre-colonial period, saw the activities of traditional/indigenous African education and two main religions – Islam and Christianity – shape the development of adult learning in the country (Mushi 2012). In traditional African society, for example, there were no schools but children, youth and adults were educated by their parents and elders. Knowledge, skills and values were imparted informally at didactic and practical levels. This education came to complement adult learning activities that were introduced by the Arabs and Christian missionaries aimed at enabling their converts to read religious literature and to promote their religious culture. During the second phase, the colonial period, adult education functioned as a mechanism for legitimizing the colonial rule and to stimulate colonial economic activities.

During the third phase, the post-colonial period, adult education became a means of empowering adults to transform the economic and social constraints inherited from the colonial past. At independence in 1961, for example, the inheritance was an economically poor and illiterate society; about 85 % of the population (80 % men and 89 % women) were illiterate (Mushi 2012). In addition to poverty and illiteracy, hunger and diseases were perceived as a drawback to nation building. Adult education was needed to enable the adult population to understand the root cause of these constraints and the manner in which they could be transformed.

Apart from this, Tanzania, as for other countries, was experiencing changes in demographics and technology that were affecting living and working patterns, calling for new learning needs, skills and knowledge. Adult education was considered necessary to enable adults to continue learning throughout their entire life span to avoid lagging behind other countries that were advancing using new forms of organization and technology.

38.1.3 Nyerere's Contributions to the Growth of (Older) Adult Education

When Julius K. Nyerere emerged as first President and Party leader in the early 1960s, he attributed the source of the economic and social constraints inherited from the colonial past to ignorance and he believed that it could be transformed by

people working together and learning how to remove them. He conceived adult education as an instrument for transforming the miserable living conditions which people had taken for granted as their fate either from tradition or the colonial past. To him, adult education was learning about anything that helped adults to understand their environment and about the ways they could change their lives. He identified the objectives of adult education in Tanzania as to shake people out of a resignation to the kind of life they have lived for centuries past, to teach them how to improve their lives and to learn how to produce more in farms and factories and to have everyone understand national policies of socialism and self-reliance (Nyerere 1975). He saw the attainment of these objectives as necessary for national liberation and development. Clearly, Nyerere's concept of 'shaking' people does not ostensibly differ from the concept of *conscientization* advocated by Paulo Freire (1970), the process of making people aware of their oppressive conditions with a view to transforming them to improve their lives. For Nyerere, printed matter, radio, films, discussions and experienced people -older adults- were sources from which adult learners could acquire knowledge. Older adults were conceived as a source of information, knowledge and experience in everyday social life (URT 2003) and they could be used to impart knowledge, skills and values through learning by doing. In traditional African society, for example, older adults were teachers; they imparted knowledge informally and learners imitated what they were taught; older adults were also learners as learning was a life-long process.

Nyerere's views (1979) were supported at that time and subsequently by many international and local adult educators – such as Hall (1975), Kassam (1978), Mpagolo (1980) and Kamwela (1986) – whose ideas functioned as an ideological justification and were an important part of the intellectual climate supporting the growth and development of adult education in this country. He echoed well-known positions of humanist theorists such as John Dewey (1944), Malcolm Knowles (1970), Carl Rogers (1969) and Patricia Cross (1981) who advocated for learner-centred learning approaches that exploit adult learners' potentialities and capacities. The role of the teacher is to facilitate the adult learning process through 'learning by doing', the humanistic education principle which is also believed to be an outgrowth of indigenous African education. The humanistic curriculum orientation also has influenced the context within which community-based adult learning programmes were conceived and implemented.

Clearly, Nyerere was not merely writing about adult education for its own sake, but most significantly he was president and party leader. As such, he attempted to mobilize and persuade people to live together and learn what he considered to be of immediate importance to the development of the country. Moreover, he had the power to do this task, something which the vast majority of leaders and adult educators did not have (Mushi 2012). Nyerere with his ideology of socialism and self-reliance provided the ideological justification and framework for the promotion and organization of (older) adult education in the country, particularly during the 1960s–1980s. However, with the introduction of a liberalized economy, the country's developmental strategy that focused on socialist development was abandoned in favour of the new development strategy. Since then, adult education programmes that were organized and conducted after 1980s had no explicit ideological base.

38.1.4 The Influence of International Declarations

International declarations have also contributed to the context in which adult learning was conceived and developed. The right to education is enshrined in the Universal Declaration of Human Rights which the 1948 United Nations General Assembly adopted. Many countries including Tanzania have signed and ratified the Declaration and adopted education policies in the line with international declarations on primary and adult education. The Addis Abbaba Conference on the Development of Education in Africa (1961), the Abidjan Regional Conference on the Planning and Organization of Literacy Programmes in Africa (1964), the Tehran Conference on Literacy (1965), the World Conference on Education for All (EFA 1990) and the World Education Forum (2000) are some of the declarations and resolutions that have been adopted by the government and reinforced through the national constitution and various adult educational policies to provide a framework for adult learning initiatives, as revealed in the ensuing sections of this chapter.

38.1.5 Policy Developments and Programming

The national plans for social and economic development (1961–1981) called for functional adult education to equip adults with knowledge, skills and values to effect maximum contribution to economic and social development. The Presidential Circular no. 1 of 1970 echoed a similar message; it called for establishment of workers' councils in all government and non-government institutions so that workers could be represented in their decision-making. The Prime Minister's Directive was then issued in 1973 to elaborate on how adult education and specifically workers' education activities were to be organized in workplaces. The decentralization policies of 1970s had a similar aim; to take power and authority from the centre to the regions and grassroots to enable the people to participate in decision making on issues which were of interest to them and to the nation.

The Cabinet paper no. 96 of 1974 called for the establishment of Folk Development Colleges (FDCs) in each district in the country to provide adult neo-literates with relevant knowledge and skills to transform rural poverty, the call that was reiterated in the 1995 Education and Training Policy (URT 1995). The ETP also called upon private institutions and individuals to collaborate with the government to provide education, including adult learning, following the privatization and liberalization policies that were introduced in the 1990s.

Again, the Tanzania Development Vision 2025, developed in 1998, envisaged to transform the country's economy to be strong and resilient and underlined an imperative to create a well-educated nation sufficiently equipped with knowledge to realize the perceived aim. High priority was given to Universal Primary Education (UPE), adult and tertiary education, including continuing education programmes. The need for adult learning was further emphasized in the Adult and Non-formal

Education Sub-sector Medium Term Strategy for the period 2003/2004–2007/2008. This strategy addressed, *inter alia*, the problem of increasing levels of illiteracy among the adult population, an important step that could contribute to poverty alleviation and sustained social and economic development in the country. The evaluation of the strategy revealed that a number of target groups were yet to be realized and consequently the government has prepared the Adult Education Development Plan (ADEP) 2012/2013–2016/2017 to help ensure that people's living conditions are improved and a lifelong learning society is created through adult education (URT 2011).

38.1.6 The Current State of Older Adult Education

Who Is an Older Adult in Tanzania? In Tanzania, the term *older adult* is defined differently based on age, social roles and status of individuals in their community (URT 2003). Biologically, an individual is considered to be an older adult from the age of 60 which is also, legally, recognized as a retirement age in the country (URT n.d.). Socially, people are recognized as older adults based on their social roles and status, for example, as leaders in their workplace or community. Employment is also used as a criterion for defining older adulthood. According to the URT (2003), for example, older persons in the context of Tanzania are either 'salaried' or 'self-employed' or ones who are living in a rural area whose age does not allow them to engage in active work. Therefore, old age is thought to begin at the point where active contribution is no longer possible, the phenomenon that may also affect their capacity to learn new subject matter, their learning pace and transfer of knowledge. Older adults in Tanzania, usually belonging to the poorest and marginalized groups, include retirees (some of them who are eligible for pension), peasants, live-stock keepers and fishermen.

38.1.7 Adult Learning Strategies

Older adult learning opportunities have been offered under three learning contexts: namely, formal, non-formal and informal learning settings.

(Older) Adult Learning in Formal Institutional Settings Deliberate efforts have been made by the government and private agencies to support the provision of older adult learning within the formal education system. Older adult learning opportunities offered under this context are well structured and coordinated, lasting for a specified period of time. These include adult learning programmes organized by tertiary institutions, universities and other institutions of higher learning. These programmes take many forms including classroom-based adult learning and self-directed activities. Employees, including older adults in various economic and

social sectors, have been encouraged to learn new knowledge and skills to cope with the impact of new technologies in work environments which are demanding new patterns of re-skilling and re-tooling. Through government and private sponsorship, some employees have been pursuing continuing education programmes through open and distance learning, colleges and universities within and outside the country. Yet there is a feeling that education offered to adults by non-conventional education systems is second rate, the perception attributable to the low status accorded to open and distance learning compared to other orthodox educational systems.

Older Adult Learning in Non-formal Institutional Settings Older adult learning activities have also been organized outside the established formal education system targeting specific adult groups including older adults – workers, peasants, unemployed, retired employees, women and other vulnerable groups. With government assistance and support from international agencies, Tanzania managed to reduce the adult illiteracy rate from 85 % in 1961 to 9.6 % in 1986 through a functional literacy approach related to ideological and technological motives. In ideological terms, adult education programmes were part of the country's national development strategy aimed at achieving socialist development with a focus on equity and growth. However, in the mid-1980s, this strategy changed in favour of efficiency and growth, thus paving way to liberalization and privatization policies. Clearly, given this move, adult education was no longer a priority and central to a national development strategy; the government commitment, political will and enthusiasm among the people began to wane. Correspondingly, older people were unidentified in such a strategy.

Apart from this change in ideology, the manner in which adult education programmes were planned also has contributed to this slippage. Although the government had advocated for learner centred-learning, this crucial adult learning principle was never adhered to; it was simply a governmental ideology. Programmes were developed in a top-down manner without involving adult learners, the process that was in sharp contrast with the espoused principles of adult programme development and delivery (e.g. Knowles 1970). Since the majority of adult instructors had not undergone any meaningful training in adult learning principles, they could not handle the theoretical and practical aspects of adult learning or apply learner-centred methodologies. The learners detached themselves from active engagement despite the bylaws that were instituted to ensure regular attendance. Some adult learners who did not attend classes complained about the issues of old age, eye-sight problems, family commitments, illness and a lack of learning materials. By 2007, for example, only 1,288,664 adults, including older adults (593,980 males and 694,684 females), were attending adult literacy classes (URT 2008).

On the basis of the observed weaknesses, the Integrated Community Based Adult Education (ICBAE) programme, along with Regenerated Freirean Literacy Empowering Community Techniques (REFLECT) methodology, were considered to be the best approaches to adult learning, as they were learner-centred compared to previous top-down approaches. The ICBAE programme and REFLECT methodology were based on learning needs that emanated from the people through partici-

patory learning approaches. The ICBAE programme was established in the mid-1990s with a broad goal of supporting post-literacy activities via development of a learner-centred and community-based approach (Mushi 2012). The aim was to demonstrate how literacy can be used at the community level as a tool and a catalyst in the development of local income-generating activities. The programme drew on successful programmes in the country and elsewhere in literacy and community-based education.

Although the ICBAE programme borrowed ‘successful’ overseas adult education experiences, it had negative effects, probably because the innovation was new to the Tanzanian environment and was hurriedly implemented on a wider scale without adequate ideological and technological support. Thus, although adult learners and the leadership had hoped for significant improvements in socio-economic development, this did not happen. In some centres the REFLECT principles were generally not adhered to; some of the instructors were not aware of the REFLECT methodology, so they could not integrate the literacy skills with income-generating activities which were at the core of the ICBAE programme. They continued to apply teacher-centred approaches which alienated adult learners in the teaching and learning process. By 2008, there were only 907,771 adults (434,446 males and 473,305 females) who were attending the programme (URT 2008). It was feared that some segments of the adult population might be left behind and particularly vulnerable groups, including older adults.

The *Yes I Can* literacy programme designed to be complemented by the use of other participatory methodologies such as REFLECT, has been introduced to concentrate more on vulnerable youth and adults and is currently under experiment in six districts. The programme supported by the Cuban Government is believed to be the best approach that will exploit the country’s potential to achieve Education for All, as it is geared to enabling learners to hear, see, and act at the same time (URT 2008). Adult learners graduating from this programme will be absorbed into a post-literacy programme known as *Yes I can Continue*, a programme meant to address the learning needs of communities. However, since this programme is delivered through radio and television (comprising televised classes), it is unlikely that it will reach the vulnerable older adult groups because a large number of these groups in the rural areas do not have access to electricity.

With regard to Folk Development Colleges, these were established in the mid-1970s with the support of the Swedish Government. By the late 2000s, there were 53 FDCs with an enrolment of 27,907 adult students (14,106 males and 13,801 females) pursuing various programmes aimed at addressing rural challenges, including poverty (URT 2008).

(Older) Adult Learning in Informal Settings Adult learning has also been taking place in informal learning settings, where older adults acquire knowledge, skills and values from day to day experiences, through observation and active participation, as they interact with their environment, within the family, community, in buses while travelling, in market places, in religious gatherings, museums, libraries, political rallies, tourist centres, mass media and other sources. Older adults also have volun-

teered in imparting knowledge, values and skills informally to other adult learners. In community and work environments, for example, adults learn through observation and participation in activities, learning by doing, one of the learning principles which underpinned the philosophy of traditional/indigenous African education. In traditional African society, knowledge, values and skills were imparted at didactic and practical levels, through imitating what the elders performed. This form of learning is still practised in various communities, work environments, political and social institutions and has served as an important source of social knowledge.

38.1.8 Who Benefits from Older Adult Learning?

The profile of older adult learners in the country includes adults who have never had a chance to attend formal schooling; the non-literates, those who have finished initial education and dropped out due to various reasons and decide to continue with further learning; and professional adult learners, those who have already been in the formal education system and are employed or retired. Many older people, the majority being women, live in rural areas in poverty and endure prolonged diseases, struggling for survival. Although the aim of the Tanzanian educational policy is to provide adult learning opportunities to all (older) adult groups in the society, this was simply rhetoric; in reality, some groups have had more access to adult learning opportunities than others, particularly those adults who have had the opportunity to attend initial education; those in the urban areas where there are more educational facilities than in rural areas and adults working in government and private institutions. Marginalized older adult groups – fishermen, hunters, gatherers, nomads, pastoralists, the disabled and members of the ‘hard to reach’ communities – have not benefitted much from adult learning opportunities offered in the country to date.

38.1.9 Sengerema as a Successful Older Learning District

Sengerema district is located in Mwanza region in the north of the country, covering an area of 8817 km² with a population of 663,034 people (330,018 males and 333,016 females). The local economy is based on small scale farming, livestock keeping, fishing and small-scale businesses. With a literacy rate of 56 %, most of the adult neo-literates were unable to apply the functional literacy skills they had acquired from the literacy programmes. Hence, Sengerema district was one of the four districts selected as an Integrated Community Based Adult Education (ICBAE) pilot project in the mid-1990s with a broad goal of supporting post-literacy initiatives in the country, through development of an adult learner-centred and community-based approach. The aim was to illustrate how literacy can be used at the community level as a tool and a catalyst in the development of local income-generating initiatives.

With the support of local government and community based organizations, adult learners have established various projects – namely, poultry, beekeeping, tailoring, knitting, water project, tree planting, crop production, animal husbandry, carpentry, flour milling and gardening – linked to adult learning activities that employed a REFLECT methodology. The integration of the 3Rs with project activities has served as a source of motivation to older adult learners as a recent study in Sengerema has revealed (Isaack 2013). The literacy rate has increased from 56 % in 1996 to 59 % in 2004. Through the projects, older learners have managed to establish a library to be used as a resource centre to consolidate adult literacy skills. According to Isaack's study (2013), adult learners felt that they had increased their literacy skills and were more confident in participating in decision making processes and in contesting various leadership positions. Through specific gender education, men were gradually changing their views and attitudes that had undermined women in various activities, including decision making. With a water project, the Sengerema community was now enjoying safe and clean water in comparison with before the project. Nutritional standards were gradually improving as a result of gardening, husbandry and poultry projects that had been introduced. Farmers were modernizing their agricultural activities, moving away from using traditional farming implements to modern ones (tractors, popularly known as power tillers) to improve the quality and output of agricultural production. Local charcoal stoves have been introduced, thus minimizing the consumption of charcoal, thereby enhancing the conservation of the environment, a critical issue in developing countries today.

However, there were several challenges facing adult learners and facilitators. Some of the facilitators were unqualified to teach older learners for they had received short training only which did not enable them to become competent in adult education methodology and they could not employ the REFLECT approach. Other challenges included lack of political will and support for adult learning, as well as lack of capital and modern facilities to be used in promoting income-generating projects.

38.1.10 Older Adult Learning/Education in the Future: Educational Issues and Concerns

Older adult education programmes in the country do not seem to be effective as most of them are urban oriented serving the interests of fewer (older) adult learners. Although plans were made to expand the education of (older) adults, illiteracy rates have continued to increase at the rate of 2 % annually and is currently estimated at 31 % (URT 2011). Older (adult) and continuing learning opportunities are accessible only to a few (older) adults from high-income families who make up only a small percentage of the total population of adults. Certainly, the governmental objectives of adult learning/education cannot be achieved without addressing the needs and problems of vulnerable groups, including those of older adults.

In order to realize this, first, a holistic and robust adult education policy is required to provide support and to guide the practice of adult education in the country. Second, we must listen to the voices of adults, including older citizens, when developing adult learning programmes. Third, we need to build capacity of adult instructors and coordinators through effective training in adult teaching and learning principles. Fourth, there is a dire need to renew political will for and commitment to adult education and to create a conducive environment for promoting adult education. Fifth, there is need to introduce realistic plans and budgeting for the adult education subsector which is currently very small compared to other education subsectors. Last but not least, we need to extend adult education opportunities to vulnerable groups, including older adults, to enable them to face challenges emanating from a changing economy, technology, and demographics.

38.2 Conclusion

This chapter has provided an account of the practice of (older) adult learning/education in Tanzania. Adult education activities recorded significant achievements after independence but could not be sustained beyond the 1980s due to lack of an appropriate ideological base and a combination of factors relating to the organization and implementation of the programmes. Adult education activities in the 1960s–1980s, for example, were defined and justified by a socialist ideology and received adequate support from the government. Although various interventions were introduced to revamp adult learning activities, such interventions did not seem to be effective due to lack of political support and public enthusiasm. Therefore, renewed efforts are needed if adult education activities are to be improved. These include the need to revive the political will and support for adult education, develop a holistic and robust adult education policy, introduce realistic plans and budgeting, build capacity of adult instructors and co-ordinators and to extend adult learning opportunities to marginalized groups to enable older adults (along with other sectors of the Tanzanian population) to reap the benefits of positive initiatives.

References

- Cross, K. P. (1981). *Adults as learners. Increasing participation and facilitating learning*. London: Jossey Bass.
- Dewey, J. (1944). *Experience and education*. New York: The Macmillan Company.
- Freire, P. (1970). *Pedagogy of the oppressed*. London: Penguin Group.
- Hall, B. L. (1975). *Adult education and development of socialism in Tanzania*. Nairobi: EALB.
- Isaack, S. (2013). *Contribution of ICBAE programme to poverty reduction in Nyamagana and Sengerema districts-Tanzania*. Mwanza, Tanzania: Unpublished M.A (Education) dissertation, University of Dar es salaam.

- Kamwela, A. (1986). *The policy and practice of adult literacy*. Dar es salaam: Dar es salaam Publishers and Sales Agency.
- Kassam, Y. O. (1978). *Adult education revolution in Tanzania*. Nairobi: Shungwaya Publishers Ltd.
- Knowles, M. S. (1970). *The modern practice of adult education: Andragogy versus pedagogy*. New York: Association Press.
- Mpogolo, Z. J. (1980). *Functional literacy in Tanzania*. Dar es salaam: Swala Publishers.
- Mushi, P. A. K. (2012). *History and development of education in Tanzania*. Dar es salaam, Tanzania: Dar es salaam University Press.
- National Bureau of Statistics (NBS) Tanzania. (2012). *Tanzania in figures*. Tanzania: Dar es salaam.
- Nyerere, J. K. (1975). Education never ends: The 1969 and 1970 New Year's Eve addresses to the nation. NAEAT, *Adult education and development in Tanzania*, (1), 1–15.
- Nyerere, J. K. (1979). Adult education and development. In H. Hinzen & V. M. Hundsdorfer (Eds.), *Education for liberation and development: The Tanzanian experience* (pp. 49–55). Hamburg: UNESCO Institute for Education.
- Rogers, C. R. (1969). *Freedom to learn*. Columbus: Charles, E. Merrill.
- United Republic of Tanzania (URT). (1995). *Education and training policy*. Dar es salaam: Ministry of Education and Culture.
- United Republic of Tanzania (URT). (2003). *The national ageing policy*. Dar es salaam: Ministry of Labour, Youth Development and Sports.
- United Republic of Tanzania (URT). (2008). *Confintea VI report: The development and state of the art of adult learning and education (ALE)*. National report: Ministry of Education and Vocational Training (Tanzania mainland and Zanzibar).
- United Republic of Tanzania (URT). (2011). *Adult education development plan (AEDP), 2012/13-2016/17*. Dar es salaam: Ministry of Education and Vocational Training, Education Sector Development Committee Taskforce.
- United Republic of Tanzania (URT). (Undated). *Regional workshop on ageing and poverty in Tanzania*, Dar es Salaam, 29–31 October, 2003. Country position paper, Vice President's Office.

Chapter 39

Turkey

Suzan Yazici and Nilufer Korkmaz Yaylagul

39.1 Introduction

The current movement of Turkey towards modernisation in the twenty-first century calls for a close examination of what the field of adult education may contribute to the development of a more just and equitable society. The educational reality of the twenty-first century is that lifelong learning will become increasingly important for all citizens (Field 2006). There is of course a risk that with the continuing introduction of technological innovations, many people may be excluded from the ensuing advantages due to a structural lag in providing an adequate supply of educational support systems. Brookfield and Hoist (2010) are strong advocates for a ‘radicalization of learning’ in order for societies to meet the challenges of rapid social and economic change. Efforts to explore the extent, level and types of adult education practices and initiatives must necessarily be country specific and involve a focus on social diversity, policy, training, program development, research and evaluation.

Today the provision of educational opportunities for current and future cohorts of older people is becoming an important component of the lifelong learning concept because of the demographic transformation affecting Turkey and the rest of the world. Adult education is part of lifelong education and is seen by Fasakun (cited in Onyenemezu 2012: 1) as being “concerned with preparing people for life, but rather with helping /assisting people (adults) to live more successfully as useful members of their societies and contribute meaningfully to the development of those societies”. Tan (2006) argues that adult education is essentially concerned with human resource development that includes a major focus on assisting adult learners to upgrade their professional skills and knowledge to cope with a rapidly changing

S. Yazici (✉) • N.K. Yaylagul
Department of Gerontology, Akdeniz University, Antalya, Turkey
e-mail: syazici@akdeniz.edu.tr; niluferyaylagul@akdeniz.edu.tr

world. Bükel (2009) however, defines life long learning as all education processes from childhood up to and inclusive of old age.

The aim of this chapter is to provide an historical overview and current status and developmental trends of adult education in Turkey including definitions, policies relating to older adult education, particularly in light of the influence of globalization.

39.2 The Historical Evolution of Older Adult Education in Turkey

The founding of the Turkish Republic in 1923 was the watershed for the commencement and development of a modern educational system for Turkey. The main educational challenge at the time was the need to improve the literacy skills among the general population due to the widespread prevalence of illiteracy among the citizenry. The earliest official statistics on literacy rates published in 1935 show 81 % of the population were illiterate with women recording a literacy rate of less than 9 % (TurkStat 2012). Figure 39.1 shows the illiteracy rates for the period 1945–2011.

The reading and writing abilities within the population have steadily increased over recent years. Besides formal education, several nationwide writing and reading campaigns have assisted in improving overall literacy levels among the general population. As reading and writing classes were a compulsory component of military training, it was soon realised that many young soldiers could assist in improv-

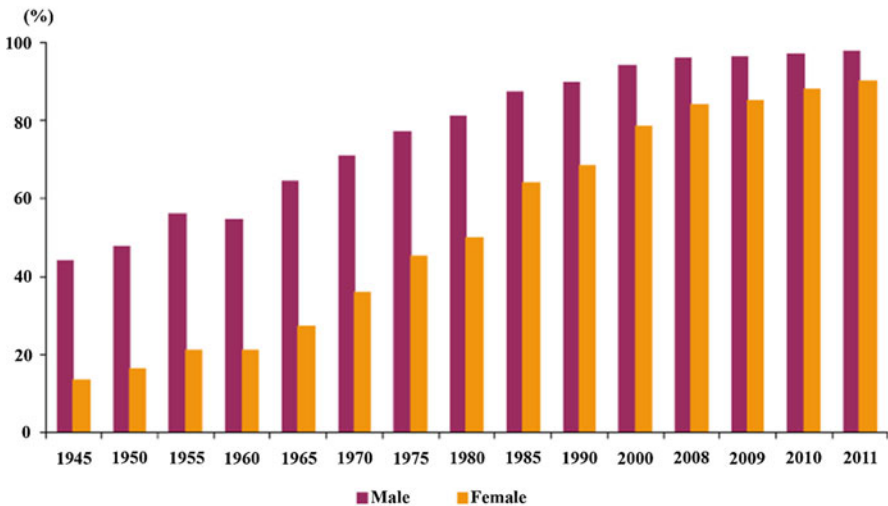


Fig. 39.1 Percentage of Population (15+) in Turkey Listed as Illiterate 1945–2011 (Source: TurkStat 2012)

ing the literacy skills of the general population. Reading and writing courses were and are still the most common form of adult education programs in Turkey (Akyüz 1989; Bilir 2005).

Since the establishment of the Turkish Republic there has been a progressive transformation of educational institutions to advance the move towards modernization. In a very generalized way the intent was to provide information and learning opportunities for all citizens irrespective of age, class, gender or ethnic background (Okçabol 2005). An important first step in terms of establishing a modern educational system was the introduction of “Tevhidi Tedrisat” law in 1924 which was administered under the Ministry of Education with a clear mandate to unify and centralize education and teaching. A radical initiative accompanying the development of the Turkish educational system involved the changing of the alphabet from Arabic to Latin in order to enhance an easier pathway to the acquisition of literacy skills and abilities (Önal 2010). It is important to understand that ‘formal’ education represents the traditional pathway from elementary, secondary to tertiary level or university education and incorporates an obligatory period of education called “4+4+4”. After attending the first 4 years at 10 years, children are expected to choose the branch schools regarding their area of interest. Twelve years are obligatory but students can choose to take distant training for the last 4 years. ‘Informal’ education primarily includes public education, vocational education, distance learning and life long development of citizens. Adult oriented education programs also provide support for the development of continuing professional skills and associated certification, including modules relating to aspects of health care, journalism, justice, sport, and teaching methods (Ministry of Education 2013). All institutions and organisations offering education whether formal or informal are controlled by as well as being legally responsible and accountable to the Ministry of Education.

The introduction of *Public Houses* (Halk Evleri) in 1932 provided adults access to alternative learning spaces separate from existing formal learning environments. They were concerned with promoting adult education and culture through reading and writing classes. The programs involved a broad mix of cultural activities such as language, literature, fine arts, sport, history, and excursions as part of the curricula offerings for adult learners (Özkan 2008). By 1940 it became clear that there was a need to prepare suitably qualified facilitators to advance the learning outcomes of adult learners. Turkey established *Village Institutes* (Köy Enstitüleri) to educate teachers in how to plan and present educational activities and programs for village communities. Plans were also initiated whereby some children from rural areas when reaching an adequate level of education were deployed to assist with the educational development of adults in a range of areas including gardening, viticulture, building, animal breeding, and iron work (Akyüz 1989). The preceding approach involved the practical delivery of adult education to village communities and aimed to promote the development of rural communities socially, economically, culturally and continued until its eventual abandonment in 1954 (Kartal 2008). Today, modern educational systems throughout the world have adopted this conceptual framework as ‘Train the Trainers’ as an essential component of adult education (Economic and Social Commission for Asia and the Pacific 2001).

The developments in a small number of higher education institutions in Turkey have been instrumental in recognizing the importance of offering educational opportunities for older Turkish citizens. For example, the Faculty of Educational Sciences at Ankara University offered master and doctoral programs in public education and a masters program of adult education in the Department of Life Long Learning and Adult Education. At the present time, other universities throughout Turkey are supporting lifelong learning and adult education programs. An impressive project of education for retired persons was recently introduced by the Lifelong Education Center at Boğaziçi University in a collaborative undertaking with Harvard University in the United States. Subjects offered included history, archeology, political science, art and humanity studies. Unfortunately the program is limited to older adults who have already reached high levels of education.

In 1948 the United Nations proclaimed that education is a universal right for everyone without exception (United Nations Universal Declaration of Human Rights, 1948, art.26). Almost three decades later the United Nations International Covenant on Economic Social and Cultural Rights (1976, art.13) advanced the concept of lifelong learning in so far “...that education shall be directed to the full development of the human personality and the sense of its dignity, and shall strengthen the respect for human rights and fundamental freedoms”. It is to be noted that Turkey signed this declaration in 2000 and it came into force in 2003 (Tortop 2010). The EU Lisbon Strategy (2000) which proclaimed the right of all citizens to have access to education opportunities, vocational education and life long learning was a strong factor in moving Turkey to accelerate its membership process to join the European Union. The concept of life long learning received major attention at the 8th (2001) and 9th (2007) forums on Turkish Development Plans in order to comply with the EU harmonisation process. As a consequence, a unit was established in the Ministry of Education under the title of the Life Long Learning Directorate General with a mandate to develop, implement and manage adult educational and vocational programs in accordance with the EU Lisbon Strategy (Ministry of Education 2013). The 17th National Education Council (2006) promoted Life Long Learning and prepared a *Lifelong Learning Strategic Paper* in support of the overarching intent presented by the Lisbon Strategy (Bağcı 2011).

39.3 Aging and Adult Education: Emerging Challenges for Turkey

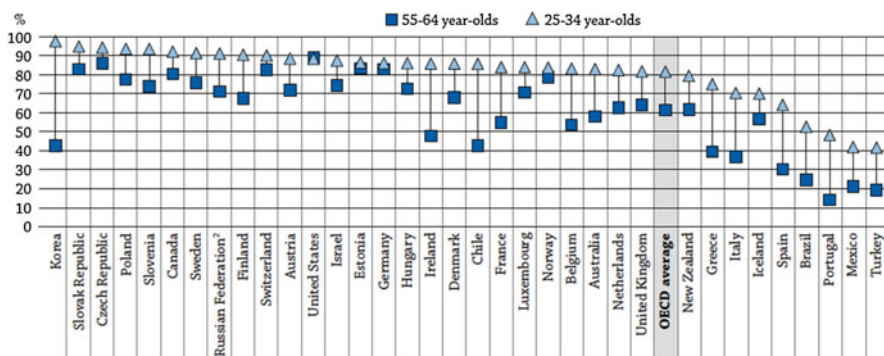
At the present time Turkey has a relatively young population compared to developed countries around the world. However, demographic trends show that Turkey is moving rapidly towards a major increase in the overall number and proportion of older people in the population. Population statistics for 2013 indicate that the percentage of aged persons 60 years and over represent 10.5 % of the total population. Population projections for 2050 estimate that the percentage of older persons 60 years and over will amount to 25.8 % of the total population (TurkStat

2013a – calculated by authors). This major demographic transition warrants urgent attention by educationists and policy makers in order to fully appreciate and understand the impending social, educational and economic implications for Turkey.

Adult education programs are particularly important for disadvantaged groups and require a rethinking of educational resource allocation policies (Tatar 2009). Education has been an area in which women in Turkey have and still remain a disadvantaged group. The number of illiterate people in Turkey is over 2.75 million at 2012 which constitutes 4.1 % of the total population with 83 % being women. Future planning will need to emphasize ‘positive discrimination’ in order to correct what is in effect an unacceptable level of gender inequality in terms of access to education. In the past many local and national campaigns have tried to increase the education level of women. Sabah (2006), evaluated the behavioral changes among women who completed reading and writing courses and found a positive effect using despair, social comparison and self assessment scales. The population aged 60-plus represent about half of the illiteracy levels in Turkey. The gender inequality increases with age and the rate of illiteracy is almost fivefold for women compared for men aged 60-plus whereby it is between 3 and 4 fold among all other age groups (TurkStat 2013b). There is a negative correlation between age and level of education. The total percentage of higher degree graduates (masters and doctorate) is 0.79 % of the total population. The number of higher degree qualifications within Turkey is currently 11,384 for women and 34,049 for men for the age of 60+ population (TurkStat 2013b).

Compared to the OECD average, Turkey shows a much lower education level in several areas of education. The percentage of the population for the 55–64 age group that has attained at least upper secondary education within the OECD average is over 60 %, whereas in Turkey it is only 20 %. This trend is similar for Turkey for all levels of education among OECD countries. It is clear from Fig. 39.2 that Turkish citizens in general are well behind educational achievements in OECD countries.

At the present time there are no large scale education programs organized specifically for the older population. While they may attend existing adult education programs are not developed suitable in terms of content and presentation. There are no reliable statistics available that indicate the level of involvement of the older age group who have taken adult education courses. Some, 64,239 official adult education courses have been introduced for the year 2011. Over two million people have attended and finished these courses. There is no obvious gender differential in relation to participation levels in the courses offered. These courses are provided all over the country but the participation levels differ in terms of location and population density. When the non-formal education activities according to institutions and organisations are evaluated for the year 2011, 42,430 out of 64,239 courses were provided by the Education Ministry and subsidiary where private organisations exist under the ministry by law. They consist of private education centers to support formal education, motor vehicles drivers course, special education and rehabilitation courses, apprenticeship courses. 13,500 courses were introduced by municipalities. Adult education courses of municipalities are one of the most important social activities for residents with any background. They are free and aim to attract people



1. Excluding ISCED 3C short programmes.

2. Year of reference 2002.

Countries are ranked in descending order of the percentage of 25-34 year-olds who have attained at least upper secondary education.

Source: OECD, Table A1.2a. See Annex 3 for notes (www.oecd.org/edu/eng2011).

StatLink <http://dx.doi.org/10.1787/888932459850>

Fig. 39.2 The Percentage of Population that has attained at least Upper Secondary Education by age group (2009)

by teaching skills for work or leisure activities. Some 3,142 courses were provided by universities, 574 by confederation and trade unions and 4,593 courses by several foundation and associations (TurkStat 2013b). Koran courses are among the most widespread and attended courses in Turkey. The number of population aged 45-plus taking koran courses was 22,095 at 2008 and by 2012 the participation rate had increased more than fivefold (Ministry of Religious Affairs 2013).

Older adults, are known for their sense of ‘technophobia’ in comparison to younger generations. However, the rate of internet use is steadily increasing for all ages. At 2007 among the population aged 18-plus, internet was the leading source of knowledge with 38 % and the percentage has increased to 54.7 % at 2012 (TurkStat 2013c). A study done by Erişen (2010) found the computer literacy level of the study group aged 60–74 as 25 %. E-learning should be considered as an important component when planning future adult education programs for older adults.

Some numbers comparing OECD countries and Turkey might highlight the current situation about older adult education. The public expenditure on education was estimated only 2.71 % of GDP in Turkey, while for the OECD the average was 4.91 in 2006 (OECD 2010). Figure 39.3 shows the participation rate in non-formal education by age group. Here again, Turkey has with less than 5 % participation rate for the 55–64 years population one of the least participation rate which is less than the half of the OECD average.

Empirical research about the extent and nature of older adult education offerings in Turkey is limited. In part this is related to the low number of institutions teaching adult education. Yıldız (2004) has evaluated 110 masters and doctorate thesis written about adult education at Ankara University and Boğaziçi University for the period 1987–2001. Her work included a review to determine needs analysis and status of evaluation in the area of adult education which also found that research

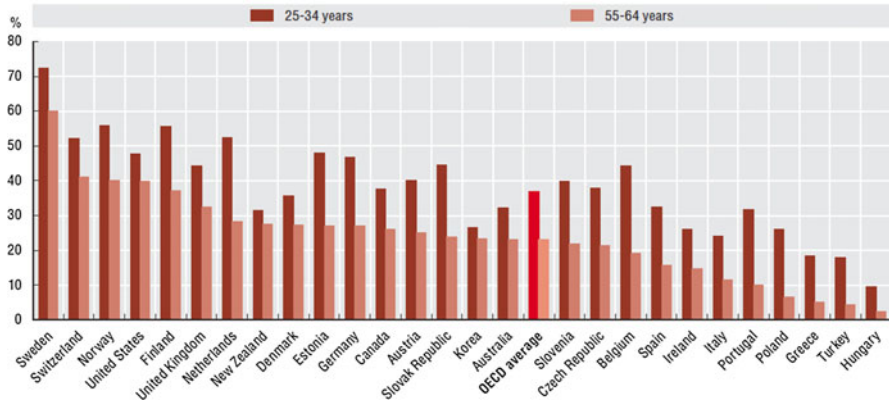


Fig. 39.3 Participation in non formal education by age group (Source: Organisation for Economic Co-operation and Development 2010)

about adult education was low and generally confined in number to Public Education Centers.

Erişen’s (2010) study concluded that the participation rates of older persons in education programmes are presently low. He has interviewed 128 persons between the age of 60 and 74 living in Ankara about their education needs and expectations. Only 2.3 % of the respondents were attending any kind of adult education program. However, the majority indicated a willingness to attend if they were available. Many older adults interviewed were not aware of available education programs. Erişen also reported that there is a belief among some adult education providers that many existing programs do not fully address the needs of older recipients and that the older are not invited to participate in the planning process of adult education programs. The preceding findings are also supported by (Yayla 2009). The research undertaken by Yayla was supported by the Turkish Ministry of Education and involved the administration of a questionnaire to a range of adult education service providers that included managers of schools, ministry and provincial organisations and teachers. In total 1300 respondents completed the questionnaires. The majority of the respondents were of the opinion that the current Public Education Centers were more focused on improving the competencies for skilled labour with little attention given to older adult education.

39.4 Discussion

The equity of all citizens in terms of accessing basic education in the modern nation state in Turkey has been the main target since the founding of the Republic. Indeed access to basic education is proclaimed as being free for everyone based on human rights and citizenship. It is quite concerning that global trends and developments in

adult education programs for older adults show that Turkey has much work to do in order to be operating on a similar level.

The resolution carried at the 2000 European Commission (EC) meeting in Lisbon about lifelong learning aimed at introducing strategies to produce full employment outcomes for their respective populations. In particular, there was a focus by the European Commission to address globalization processes that included ways of supporting disadvantaged groups such as women and older persons to participate in the workforce (Bağcı 2011). Al'Abri (2011: 491) suggests that "globalization can be thought of as the speedy, free movement of people, services, capital goods, ideas and knowledge across national borders, encompassing the entire globe". Globalization no matter how defined must be seen as an influencing force on all areas of education.

The aging of the population and the increasing number of older workforce participants engaging in retirement increases the need for a qualified workforce to operate in an increasingly changing and technologically oriented world. While Turkey has embraced many of the strategies and approaches to lifelong learning proposed by the EU it is becoming clear that Turkey needs to focus on its own unique issues and challenges. Bağcı (2011) in a comparative review of lifelong learning across the EU and Turkey found that Turkey has incorporated much of the strategic orientations of the EU in its reports on lifelong learning. The traditional focus of lifelong learning in Turkey has been primarily concerned with meeting the requirements of EU harmonisation process with little or no real provision of relevant and ongoing programs for people in later life.

It is important to understand that for many older people their low level of education, low economic status, physical restrictions and accessibility problems are some factors hindering their attendance at adult education programs. Erişen (2010) found out in his empirical research that among the older population a need exists for courses about health care, recreational activities, socio-cultural activities, computer skills and courses that may help to earn additional income. The respondents also mentioned the need for easy accessibility, costs that are low or free of charge, short duration, small group settings, and suitable learning techniques as some factors necessary for them to attend. Adult educators must also address the problems associated with the provision of effective information and communication systems on the availability of adult education programs and activities. The reasons for not attending adult education courses were evaluated by Cankaya (2005) who found that low self esteem, negative attitudes towards education programs, financial and communication problems, time limitations, responsibilities in families, and disappointing experiences from previous courses were powerful explanatory factors.

Most people living in rural areas are limited in accessing educational opportunities for geographical reasons. The courses organized by municipalities constitute the main source of older adult education courses. These are mainly based in urban areas. Regional disparities in Turkey result in the unequal provision of 'lifelong learning chances'. Adult education programs for rural settings in Turkey should

take into account both the uniqueness of place and people in order to ensure that programs are specific to the needs of each respective rural community. Strategies such as recruiting skilled and knowledgeable community members in classrooms under the supervision of professional teachers, which is called “grow your own” teacher have been found to be effective (Williams 2010). Recognition should be given to work undertaken by Knowles (1984) who found that older adult learners usually prefer to focus on real life issues and problems with little interest in theoretical situations. Similarly, Tezcan (2012) has found out in his empirical study with the population aged 46-plus attending public education courses that they were more practice oriented compared to the younger age group. This group had a higher willingness of learning. Elüstü (2007) mentioned that the older people usually attend courses for personal satisfaction instead of financial aims.

At the present time, the preceding requirements for older adult education are not a high priority for the Turkish education system. It is not difficult to predict that there will be a need to prepare a new professional group of adult educators who have the knowledge, competency skills and ability to engage with older adult learners. Future initiatives for the creation of a new adult educator might include the provision of post-graduate certificates and masters degrees that might be specifically designed for graduates from the disciplinary fields of social gerontology, social work, health care including professionals with an interest in working with older people who wish to be involved in lifelong learning opportunities.

39.5 Conclusion

In terms of both social justice and human rights the opportunity to engage lifelong education activities and programs (formal/ informal) should not be determined by status, education level, gender and age. Indeed access, availability and affordability to adult education should be the universal criteria for all ages (Tortop 2010). More than ever Turkey needs to examine its existing policies and educational principles to ensure that current and future generations of older people are included in social and economic developments. The future planning of adult education in Turkey should ensure that it is seen and supported as an important vehicle for promoting and encouraging the participation, inclusiveness and social integration of older people in community life throughout Turkey. Mason and Randell (1997) provide an important view on the need to promote a genuine citizenship perspective on older adults which has relevance for future adult education initiatives in Turkey:

A new education for older people will have to be more than just recreation, information and remediation, important though these aspects will continue to be. Education will need to address issues of personal and social transformation, vocationalism for older people and mechanisms for continued engagement in a society that will continue to place demands on their ability to adjust and survive. Mason and Randell (1997: 214).

References

- Akyüz, Y. (1989). *Türk Eğitim Tarihi: Başlangıçtan 1988'e* (The history of education in Turkey: From its start to 1988). Ankara: A.Ü. Faculty of Education Science Fakültesi Publication Nr 160
- Al'Abri, K. (2011). The impact of globalization on education policy on developing countries: Oman an example. *Literacy Information and Computer Education Journal (LICEJ)*, 2(4), 491–502.
- Bağcı, E. (2011). Avrupa Birliği'ne Üyelik Sürecinde Türkiye'de Yaşam Boyu Eğitim Politikaları (Life long education policies in Turkey in the process of EU membership). *Ondokuz Mayıs Üniversitesi Eğitim Bilimleri Dergisi*, 30(2), 139–173.
- Bilir, M. (2005). Türkiye'deki eğitim (okuma-yazma) kampanyalarının halk eğitimi açısından değerlendirilmesi (An evaluation of education (the Literacy) campaigns in terms of adult education in Turkey). *Ankara Üniversitesi Eğitim Bilimleri Fakültesi Dergisi*, 38(2), 103–125.
- Brookfield, S. D., & Hoist, J. D. (2010). *Radicalizing learning: Adult education for a just world*. New York: Jossey-Bass.
- Bükel, İ. (2009). Avrupa Birliği Boyutuyla İnfomal Öğrenme, Hayat Boyu Öğrenim Kapsamında Türkiye'de İnfomal Öğrenme Üzerine Ortak Bir Anlayış Geliştirme ve Farkındalık Oluşturma. *Projesi Konfesansları Bildiri Kitabı* (To create a common sense and raise awareness for informal learning on the basis of EU and about informal learning under lifelong learning concept in Turkey. *Project Conference Book*). MEB, pp. 162–176.
- Cankaya, D. (2005). Göç etmiş yetişkinlerin eğitim kurumlarının yürüttüğü yetişkin eğitimi etkinliklerine katılmama nedenleri (Migrant adult's reasons of non-participation in organized adult education activities). *Boğaziçi Üniversitesi Sosyal Bilimler Enstitüsü Yüksek Lisans Tezi*, İstanbul.
- Economic and Social Commission for Asia and the Pacific. (2001). *Train the trainer: Training fundamentals (Instructor's Reference Manual)*. New York: United Nations.
- Elüstü, A. (2007). Yetişkinlerin Eğitim İhtiyaçları ve Halk Eğitimi İle İlgili Farkındalıklarının Belirlenmesi (The evaluation of the need of education and the awareness of public education of adults). *Yayınlanmamış Yüksek Lisans Tezi*, Marmara Üniversitesi Eğitim Bilimleri Enstitüsü, İstanbul.
- Erişen, Y. (2010). Education of the elderly in Turkey: Their educational needs, expectations of educational programmes, and recommendations to the related sectors. *Educational Research and Reviews*, 5(12), 794–801.
- Field, J. (2006). *Lifelong learning and the new educational order*. London: Trentham Books Limited.
- Kartal, S. (2008). Toplum Kalkınmasında Farklı Bir Eğitim Kurumu: Köy Enstitüleri (Village institutions: A different education model for social development). *Mersin Üniversitesi Eğitim Fakültesi Dergisi*, 4(1), 23–36.
- Knowles, M. S. (1984). *Andragogy in action: Applying principles of adult education*. San Francisco: Jossey Bass.
- Mason, R., & Randell, S. (1997). Education policy for an ageing society. In A. Borowski & E. Ozanne (Eds.), *Ageing and social policy in Australia* (pp. 167–181). Melbourne: Cambridge University Press.
- Ministry of Education. (2013). *Hayat Boyu Öğrenme Genel Müdürlüğü*. http://hbgm.meb.gov.tr/modulerpro_gramlar/index.html. Accessed 7 Oct 2014.
- Ministry of Religious Affairs. (2013). *Participation in Koran courses*. Unpublished report.
- Okçabol, R. (2005). *Türkiye eğitim sistemi* (Education system in Turkey). Ankara: Ütopya Yayınevi.
- Önal, İ. (2010). Tarihsel değişim sürecinde yaşam boyu öğrenme ve okuryazarlık: Türkiye deneyimi (Lifelong learning and literacy in process of historic change: A Turkish experience). *Bilgi Dünyası*, 11(1), 101–121.

- Onyenemezu, E. C. (2012). Adult education and challenges for the 21st century in Nigeria. *Journal of Education and Practice*, 3(5), 1–6.
- Organisation for Economic Co-operation and Development. (2010). *Public and private expenditure on education, in OECD Factbook 2010*. France: OECD.
- Özkan, S. (2008). *Türk eğitim tarihi* (The history of education in Turkey). Ankara: Nobel Yayın Dağıtım.
- Sabah, S. (2006). Okuma yazma kursuna katılan yetişkin kadınların eğitim öncesi ve sonrası davranışsal sonuçlarının incelenmesi (The evaluation of adult women before and after attending reading and writing courses). *Sosyal Bilimler Enstitüsü Yüksel Lisans Tezi*. İstanbul: Maltepe Üniversitesi.
- Tan, G. (2006). A reflection of adult education in Turkey: A case of human resource development in education program. In N. P. Terzis (Ed.), *Lifelong learning in the Balkans: A historical context and current trends* (pp. 607–622). Greece: Publishing House Kyriakidis Brothers.
- Tatar, Z. (2009). Yetişkinlerin kentleşme ve eğitim ihtiyaçlarına ilişkin görüşleri (The opinions of adults about urbanisation and education needs) (p. 70). *Yayınlanmamış Yüksek Lisans Tezi*, Ankara Üniversitesi, Ankara.
- Tezcan, F. (2012). Halk eğitimine katılan yetişkin öğrenenlerin güdüsel eğilimleri (The motivational tendencies of adult learner attending public education). *Doktora Tezi*, Ankara Üniversitesi Eğitim Bilimleri Enstitüsü, Ankara.
- Tortop, Özgül. (2010). Avrupa birliği hayat boyu öğrenme temel yeterlik alanları: Türkiye Durumu (EU key competencies for lifelong learning: Turkey Case). *Yayınlanmamış Yüksek Lisans Tezi*. Gazi Üniversitesi, Ankara.
- TurkStat. (2012). *Non-formal education statistics statistical indicators 1923–2011*. Ankara: TurkStat Publication nr. 3890.
- TurkStat. (2013a). *2013 population projections, 2013–2075*. <http://www.tuik.gov.tr/UstMenu.do?metod=temelist>. Accessed 19 Oct 2013.
- TurkStat. (2013b). *Education statistics*. http://www.tuik.gov.tr/PreTablo.do?alt_id=1018. Accessed 19 Oct 2013.
- TurkStat. (2013c). *National education statistics*. http://tuikapp.tuik.gov.tr/adnksdagitapp/adn_ks.zul?kod=2. Accessed 19 Oct 2013.
- Williams, D. T. (2010). *How community schools can reinvigorate rural education center for american progress rural school and community trust*. <http://www.ruraledu.org/articles.php?id=2572>. Accessed 7 Oct 2013.
- Yayla, D. (2009). Türk yetişkin eğitimi sisteminin değerlendirilmesi. (The evaluation of the Turkish education system). *T.C. MEB Eğitimi Araştırma ve Geliştirme Dairesi Başkanlığı (EARGED)*. Ankara: EARGED.
- Yıldız, A. (2004). Türkiye’deki yetişkin eğitimi araştırmalarına toplu bakış (Perspectives on adult education research in Turkey). *Ankara University Journal of Faculty of Educational Sciences*, 37(1), 78–97.

Chapter 40

Uganda

George Ladaah Openjuru

40.1 Background

Uganda is one of five East African countries, the other four being Rwanda, Burundi, Tanzania and Kenya. It is a landlocked country surrounded by Sudan in the North, Congo in the West, Tanzania in the South, and Kenya in the East.

Older adult education is a concept hitherto not known within the Ugandan adult and non-formal education vocabulary. This is because Adult and Non-formal Education includes all persons considered an adult in Uganda. This chapter takes a careful look at adult education provision in Uganda with a view to understanding and explaining the opportunities available for the participation of older persons in adult learning/education. This will consist of a discussion of the demographic characteristics of Uganda, explaining the conceptual and historical perspectives of adult education and lifelong learning, and a review of policies related to older persons. It will then attempt to understand the educational challenges experienced by older adults in education and imagine what the future might look like for older adult education in the context of adult education provision in Uganda. The chapter concludes by making some policy recommendations for the education of this group in Uganda.

40.2 Demographic Characteristics of Uganda

Uganda's population is largely young, that is, below 30 years of age as shown in Table 40.1 below. The urban population is relatively young with a larger number between the ages of 15–40 years compared to the rural population with a majority

G.L. Openjuru (✉)

Faculty of Education and Humanities, Gulu University, Gulu, Uganda

e-mail: george.openjuru@gmail.com

Table 40.1 Demographic characteristics of Uganda by age and residence (Rural and Urban)

Table	Urban			Rural			Total		
	Age	Male	Female	Total	Male	Female	Total	Male	Female
<5	17.4	15	16.1	20	19.3	19.6	19.7	18.7	19.2
5–9	13	13.5	13.3	18.5	17.3	17.9	17.8	16.8	17.3
10–14	12.1	13.3	12.7	17	15.7	16.3	16.4	15.4	15.9
15–19	11.2	12.5	11.9	9.7	8.9	9.3	9.9	9.3	9.6
20–24	12.5	12.9	12.7	6.1	7.4	6.8	6.9	8.2	7.6
25–29	9.1	10.2	9.7	5.5	6.5	6	5.9	6.9	6.5
30–34	7.9	6.2	7.2	5	5.2	5.1	5.3	5.3	5.3
35–39	6.2	4.7	5.4	4.5	4.4	4.4	4.7	4.4	4.6
40–44	3.6	3	3.3	3.1	3.3	3.2	3.1	3.2	3.2
45–49	2.1	2.3	2.1	2.7	2.7	2.7	2.6	2.7	2.6
50–54	1.5	1.7	1.6	1.8	2.6	2.2	1.8	2.5	2.1
55–59	1.1	1.3	1.2	1.5	1.6	1.6	1.5	1.6	1.5
60–64	0.9	1	1	1.3	1.8	1.6	1.2	1.7	1.5
65–69	0.6	0.9	0.7	1	1	1	1.1	1	1
70–74	0.4	0.5	0.4	1	1	1	0.9	1	0.9
75–79	0.2	0.5	0.4	0.6	0.6	0.6	0.5	0.6	0.6
80+	0.2	0.5	0.3	0.7	0.7	0.7	0.7	0.7	0.6

Source: Uganda Bureau of Statistics 2012

below 15 years and above 45 years. This has implications for the provision of services to this age group of older adults aged 45+.

However, according to Findsen and Formosa (2011), the global population is growing older. This trend is yet to be experienced in the developing countries in Africa. As of now, Uganda's population is increasingly growing younger, with the proportion of older people (age 60+ years) going down from 5.8 % in 1969 to 4.6 % in 2002 (Uganda Bureau of Statistics 2012). This is because of low life expectancy due to a poor quality of life related to depleted health facilities and services. On the contrary, those under 18 years have risen from 51.4 % in 1969 to 56.1 % in 2002, when the last national population census was done (*ibid.*, Uganda Bureau of Statistics 2010). Compared to the population ratio of the 60+ years in Europe (22 %), North America (18 %) in 2009, and in Australia, where it is estimated that those 50+ years constitute 31 % (National Seniors Australia Productive Ageing Centre 2010, cited in Findsen and Formosa 2011), Uganda has a very insignificant (less than 5 %) and declining proportion of older persons in the general population. This is the general trend in most regions of Africa (Ashford 2007; Abdoulie 2012).

This declining population of those 60+ years makes provision of education and services for this sector of the population not a strong priority. Instead, the proportion of younger people is getting bigger, thus making them a major concern for educational policy makers. Concern for youth becomes even more crucial with raising unemployment among them (see Ssempebwa 2008; Uganda Bureau of Statistics 2012).

Although there is presently no pressure for older adult education, the concern is slowly growing and attracting policy interest. For example, it has been noted that older women are suffering serious discrimination in Uganda (Sleap 2010). Some studies have recognised the contribution of older persons in relation to care for their grandchildren when the children's parents die young due to HIV/AIDs. The same study also noted that older persons are experiencing a number of health-related problems and poverty, which require education for this age group to survive without becoming a burden on their children and the government (Scholtan et al. 2011). So basically, the Government of Uganda has started paying attention to ageing problems resulting into a National Policy for Older Persons published by the Ministry of Gender, Labour and Social Development (MGLSD) in April 2009 (Ministry of Gender, Labour and Social Development 2009).

40.3 Conceptual Perspectives on Older Adult Education

While in other parts of the Western world (Europe, North America and including Australia), there are special adult learning programmes for older persons who are 60+ years (Findsen and Formosa 2011), in Uganda, and in much of Africa, this distinction is not there. Equally absent is the study of ageing or gerontology in any university in East Africa. Gerontological academic training is a concept that started in the early 1950s (ibid.). Hence, the idea of older adult education as a field of study is a relatively recent development. To understand older adult education in Uganda, it is important to start with an understanding of how adult education itself is defined.

Adult education in Uganda is defined as, “all learning processes, activities or programs, intended to meet the needs of various individuals considered by society as adults, including out of school youths forced by circumstances to play the roles normally played by adults” (Ministry of Gender, Labour and Social Development 2008, p. 6). This definition includes children who play roles that are reserved for adults in society (e.g. children who are heading households after the death of their parents) (Ministry of Finance, Planning and Economic Development 2004; UNESCO 2008; Colette 2012). Therefore, the definition is all-embracing, including older adults. In this chapter, older adults are understood as those persons who are 50+ years, who could benefit from a focussed provision of adult learning programmes that meets their learning needs.

40.4 An Historical Perspective

The Arab traders who taught adults how to read the Quran introduced education in Uganda. Later the Christian Missionaries Society (CMS) came in 1877 and also started teaching adults how to read the bible (Ssekamwa 2000; Atim and Ngaka

2004; Openjuru 2010). The European missionaries and colonial officials introduced vocational training in skills (Atim and Ngaka 2004; Ministry of Gender, Labour and Social Development 2008). These skills training programmes were provided to all categories of learners regardless of any age. The colonial government also provided co-operative education, agricultural extension education and public health education for the general population of Uganda including older adults (Odurkene and OKello-Atwaru 1985).

In all, there was nothing special for older adults (people who are 50+), although they were not excluded from participation in all forms of education (Obote and Alele 2011). Evidence from a study indicates that there are some pervading negative attitudes towards ageing and learning; this includes older adults themselves who see themselves as “spent forces” on account of age, as reported by Phippa et al. (2013). As a result, there is a complete lack of understanding of the concept of older adult education.

40.5 Adult Education and Lifelong Learning in Uganda

Adult Education and lifelong learning in Uganda take a number of forms. They include adult literacy education, and general education to enable those who have not attended formal schooling and non-formal education to acquire some knowledge that cannot be obtained informally. This also includes opportunities for further education in the form of professional career development, skill acquisition, and vocational education, which is necessary for the acquisition of certain skills that are needed for improving job performance (Ministry of Gender, Labour and Social Development 2008). It also includes civic and voter education carried out during Presidential and Parliamentary elections. There is also fitness training in aerobics and gym for good health; guidance and counselling to address personal, social and economic problems in society (Jjuuko et al. 2007). However, older adults are free to join even the formal school system at any level of this educational provision, including higher education, and some do join (Obote and Alele 2011).

Older adults continue to learn informally and non-formally, after their retirement from active life and work. They also learn how to take care of grandchildren left around by busy parents. They may learn to take on their new roles as elders whose primary responsibilities are to advise and supervise their communities who trust their long experience of work and life.

Under the African indigenous education, older people learn informally and through practice of the responsibility of presiding over traditional and customary functions in their families at the clan level. They provide the authority that formalises such functions. This is because older people in Africa are the most respected group of people, although this attitude is slowly dying out with the advent of west European modernity.

40.6 Policies Related to Older Adult Education in Uganda

While there is a general lack of direct attention to the education of older adults, the policy environment in Uganda is very favourable to support an advocacy movement for older learners. Therefore, in this section the existing National Public Policy Frameworks and Plans, which are thought to have some bearing on the growth and development of adult and lifelong learning and education in Uganda, are reviewed.

The National Policy for Older Persons April 2009 One of the first significant policies related to older adult education was promulgated in April 2009. This policy provides the definition of older persons in Uganda as adopting the United Nations' definition that, "Older persons are defined ...as those aged 60 years and above" (Ministry of Gender, Labour and Social Development 2009, p. 9). This age of 60 is consistent with an often accepted age concerning the subject of older adult education (Findsen and Formosa 2011). While this policy only focuses on those people who are 60+ years, this chapter includes those who are 50+ years. Coincidentally, the age of 60 is presently the official retirement age for people working in the Ugandan civil service for which preparation through re-education should ideally start at 50+.

The National Policy for Older Persons includes statements relating to the learning needs of older persons. Article 6.6 of this policy provides for training and lifelong learning. Unfortunately, this is the only statement relating to lifelong learning in the whole policy documents and it is anchored to the international commitment for the provision of Education for All (EFA) by 2015, to which the Government of Uganda is a signatory. In relation to the EFA goals, this policy makes reference to the attainment of 50 % adult literacy and equitable access to basic and continuing education, which is EFA goal 4 (UNESCO 2006, 2011). The policy acknowledges that many older persons have missed out on formal education and that they have limited access to programmes that cater for their lifelong learning needs. It promised to put in place interventions that will address training and lifelong learning (Ministry of Gender, Labour and Social Development 2009). This policy provides, "A framework for legislation and programming, as well as identifying opportunities to harness the potential of older persons. The priority areas include training and lifelong learning" (Scholtan et al. 2011, pp. 7–8). Therefore, it provides insight into the educational potential and needs for lifelong learning for older persons in Uganda.

The clearly stated training needs stated for older persons in the National Policy for Older Persons is HIV/AIDs care education. This focus is understandable, because of the high prevalence of HIV/AIDs in Uganda, many young couples die, leaving behind children whose care has to be taken over by their grandparents who provide custodial grandparent care for the orphaned grand children.

The National Plan of Action for Older Persons 2012 which supports the National Policy notes that 61 % of older persons have never been to school and out of this total 70 % are female and 30 % are male. Eighty percent of older women are illiterate compared to 41 % of men. In view of this fact, the plan calls for programmes to cater for lifelong learning for this group. Accordingly, the plan proposes to engage

older persons in a number of study programmes. These are plans whose implementation and outcomes are still awaited (Ministry of Gender, Labour and Social Development 2012, p. 3, p. 11). This National Policy on Older Persons 2009 is a more effective development in the direction of paying attention to the learning needs of older adults.

40.7 Other Related Policies

There are other related policies which can support the education older adults. These include the Business, Technical and Vocational Education and Training Act 2008. This policy is all embracing for every category of the population, including older learners. It is one of the best non-formal education policies to support the provision of education for older persons. Pleasingly, it includes training for life after retirement.

Another significant policy is the Constitution of Uganda 1995, in which the objective XVI: General social and economic objectives section (b) states that, “all Ugandans enjoy rights and opportunities and access to education...” This is further supported by the Educational Objectives XVIII, and Article 30, the Right to Education, which states that, “All persons have a right to education”. This is supported by another provision under its National Objectives and Directive Principles of State Policy which states that, “The State shall make reasonable provision for the welfare and maintenance of the Aged” (Republic of Uganda 1995, pp. 16–17, p. 30; Jjuuko et al. 2007). These articles provide solid policy grounding for the provision of all forms of education for older persons (Republic of Uganda 1995).

The constitution of Uganda which emerged in 1995 was founded on the Government White Paper on Education that came into existence in 1992. In this White Paper, under chapter 9 entitled, “Democratisation of education”, it states that government agrees with the Commission’s view “that education must be regarded as a basic human right for all Ugandans regardless of their social status, physical form, mental ability, sex, birth or place of ethnic origin” (Republic of Uganda 1992, p. 162). Although the Education Policy Review Commission was more interested in formal school education, its general statements can be used to support the education of older persons as a special interest group. The specific references to adult and non-formal education on page 176 focus on basic education or the eradication of illiteracy. As a special minority group, older adults deserve specific learning needs attention as carried out in other countries such as the UK and Australia (Pincas 2006; National Seniors Australia Productive Ageing Centre 2010).

Notably, the emphasis in this chapter 9 of the White Paper for Continuing, Lifelong and Distance Education is on youth, early school leavers/dropout, and adults in the world of work. It can be understood from this point of emphasis that older adults, people who are over the age of 50 years, were not part of this policy imagination.

Finally, the National Adult Literacy Strategic Investment Plan (NALSIP from 2002/2003–2006/2007) and the National Action Plan for Adult Literacy (NAPAL from 2010/2011–2014/2015), are two successive Government Plans that play an active role in adult literacy education in Uganda (Ministry of Gender Labour and Social Development 2011). It is important to note that adult literacy education is largely implemented in the rural areas and older adults are allowed to participate although many of them experience problems of poor eyesight that complicates their capacity in learning how to read and write. One of the strategic programme’s objectives of this plan was “to provide adequate and equitable access to literacy education by all women and men”(Jjuuko et al. 2007, p. 26). As already stated, older adults are assumed to be part of this statement.

40.8 Challenges for Older Adult Education in Uganda

In the Western world the general population is ageing, thus making older adult education an economically necessary enterprise (Pincas 2006). In Uganda the bulk of the population is young with high unemployment among them, including those with higher qualifications (Ssempebwa 2008). This scenario of youth unemployment makes the necessity for providing educational opportunities for older persons in Uganda difficult to imagine as a relevant endeavour.

The other challenge is that the total absence of the idea of educational provision for older adults leads to the absence of any form of professional preparation to deal with this group of learners as a distinct category of learners. In other words, there is complete ignorance of the pedagogical and curricula requirements to prepare educational programmes for this group of learners. As the Teaching and Learning Research Programme noted (2008, p. 1), “in spite of the ageing of the population, little is known about older people’s experience of learning over the course of their lives, the factors that might influence whether they choose to learn in retirement and what role learning plays in their lives as they grow older”. In Uganda, the mandatory retirement is at 60 years; however, those who are above 55 can also retire voluntarily, including those who need to retire on poor health grounds.

40.9 Conclusion and Recommendations for Older Adult Education in Uganda

By and large, the situation for older adult education in Uganda is quite hopeful especially with the new policy development focusing on older persons. It shows that issues related to older persons are now a growing concern. Promising as the future of older adult education may be, there is still need for the training of educators to deal with this community of learners. This will require training in the relevant pedagogical skills that are appropriate for this group – for example, participatory

methods and self-directed learning. Programmes that are suitable will need to be professionally developed that are relevant to the various learning needs of this particular group of learners.

As an upcoming new area, there is need for more research that focuses on the learning needs of older learners. This should create a better understanding of this group and their educational needs. This will involve the understanding of other issues related to learning in older age, for example, connections between health and learning. Scholars and practitioners will need to advocate for older adult learning, from programme development to training and programme implementation.

The development of learning facilities suitable for older adults is equally important, beyond the sporting facilities mentioned in the National Action Plan for Older Persons 2012/2013–2016/2017 (Ministry of Gender, Labour and Social Development 2012). In addition, the government will need to provide financial support for the implementation of the sound National Policy for Older Persons and the National Action Plan for Older Persons.

References

- Abdoulie, J. (2012). "Forty-fifth session of the commission on population and development" item, 4 of the provisional agenda – General debate on national experience in population matters: adolescents and youth. United Nations Economic Commission for Africa. New York: United Nations.
- Ashford, L. S. (2007). *Africa's youthful population: Risk or opportunity*. USAID, Population Reference Bureau. Washington: USAID.
- Atim, D., & Ngaka, W. (2004). The evolution of adult education in Uganda. In A. Okech (Ed.), *Adult education in Uganda: Growth, development, prospect and challenges* (pp. 15–34). Kampala: Fountain Publisher.
- Colette, H. (2012). *The importance of post-conflict socio-cultural community education programmes: A case study from Northern Uganda* (MIROCON Research Working Paper 64). Briton: MICROCON.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life: A handbook on older adult learning*. Rotterdam/Boston/Taipei: Sense Publishers.
- Jjuuko, R., Bugembe, R., Nyakato, J., & Kasozi, M. (2007). *Desk study of public policy frameworks related to adult learning*. Uganda Adult Education Network. Kampala: UGAADEN.
- Ministry of Finance, Planning and Economic Development. (2004). *Poverty eradication action plan 2004/5-2007/8*. Kampala: Ministry of Finance, Planning & Economic Development.
- Ministry of Gender, Labour & Social Development. (2008). *National report on the development and state of adult literacy education*. Ministry of Gender, Labour & Social Development, Literacy & Community Development. Kampala: Literacy & Community Development.
- Ministry of Gender, Labour & Social Development. (2009). *National policy for older persons: Ageing with security and dignity*. Kampala: Ministry of Gender, Labour & Social Development.
- Ministry of Gender, Labour & Social Development. (2011). *National action plan for adult literacy (NAPAL)*. Ministry of Gender, Labour and Social, Directorate of Community Development and the Elderly. Kampala: Ministry of Gender, Labour & Social Development.
- Ministry of Gender, Labour & Social Development. (2012). *National action plan for older persons 2012/13-2016/17*. Kampala: Ministry of Gender, Labour & Social Development.

- National Seniors Australia Productive Ageing Centre. (2010). *Later life learning: unlocking the potential for productive ageing*. National Seniors Australia Productive Ageing Centre, Department of Health Ageing. Australia: National Seniors Australia Productive Ageing Centre.
- Obote, V., & Alele, F. (2011, May 24). *66 years old mother goes back to school*. Retrieved October 15, 2013, from New Vision: <http://www.newvision.co.ug/D/9/35/755618>
- Odurkene, J. N., & OKello-Atwaru, D. (1985). *The development of adult education in Uganda 1900–1985*. Kampala: The Uganda National Commission for UNESCO.
- Openjuru, G. L. (2010). Government education policies and the problem of early school leaving. In J. V. Jacques Zeelen (Ed.), *The burden of educational exclusion: Understanding and challenging early school leaving in Africa* (pp. 17–34). Rotterdam: Sense Publishers.
- Phippa, S. T., Prieto, L. C., & Ndinguri, E. N. (2013, January 1). *Questia: Trusted online research*. Retrieved November 26, 2013, from www.questia.com/read/1P3-29998126861/teaching-an-old-dog-new-tricks-investigating-how
- Pincas, A. (2006, December). Older adults learning. *Adults Learning*, 4.
- Republic of Uganda. (1992). *Government white paper on the education policy review commission report*. Kampala: Government of Uganda.
- Republic of Uganda. (1995). *The constitution of the republic of Uganda, 1995*. Entebbe: Government of Uganda.
- Scholtan, F., Seeley, J., Mugisha, J., Zalwango, F., & Wright, S. (2011). *Well-being of older people study: A study on global AGEing and adult health (SAGE) sub-study*. Medical Research Council/Uganda Virus Research Unit, Research Unit on AIDS, World Health Organisation.
- Sleap, B. (2010). *Discrimination against older women in Uganda*. HelpAge International, Uganda Reach the Aged Association, Committee on the Elimination of Discrimination against Women. Kampala: HelpAge International.
- Ssekamwa, J. C. (2000). *History and development of education in Uganda*. Kampala: Fountain Publishers.
- Ssempebwa, J. (2008). Graduate unemployment in Uganda: Socio-economic factors exonerating university training. *Makerere University Journal of Higher Education*, 105–120.
- Teaching & Learning Research Programme. (2008, October). Older people and lifelong learning choices and experiences. *Research Briefing*, 58.
- Uganda Bureau of Statistics. (2010). *Uganda national household survey 2009/2010: Socio-economic module*. Kampala: Uganda Bureau of Statistics.
- Uganda Bureau of Statistics. (2012). *Statistical abstract 2012*. Kampala: Uganda Bureau of Statistics.
- UNESCO. (2006). *EFA global monitoring report 2006: Literacy for life*. Paris: UNESCO Publishing.
- UNESCO. (2008). *International literacy statistics: Review of concepts, methodology and current data*. Montreal: UNESCO Institute for Statistics.
- UNESCO. (2011). *EFA global monitoring report 2011: The hidden crisis: Armed conflict and education*. Paris: UNESCO Publishing.

Chapter 41

United Kingdom

Alexandra Withnall

41.1 Introduction

The aim of this chapter is to identify and to critically discuss some major issues pertaining to the development of later life learning in the United Kingdom (UK) where there are now more than 22 million people aged 50 plus, over a third of the total UK population (Office for National Statistics 2013). However, it must be remembered that their individual lives are inevitably affected by a whole range of socioeconomic and other factors including age itself. To supply some context, the UK comprises four countries: England, Scotland, Wales and the province of Northern Ireland. A sovereign state under international law, it is also a member of the European Union (EU) and the United Nations (UN) as well as being in membership of various other supra-national organisations. Since 1999, a range of powers, including responsibility for education and training, has been transferred or devolved from central government in London to the Scottish Government (formerly the Scottish Executive), the National Assembly for Wales and the Northern Ireland Assembly although devolution is applied in different ways in different countries. Central government, currently led by a Conservative/Liberal Democrat Coalition, remains responsible for national policy on all non-devolved powers.

As elsewhere in Europe, the economic slowdown of recent years has had notable effects on productivity, public finance and incomes and on employment prospects although some commentators would argue that the labour market has held up surprisingly well overall. Together with the pace of technological change and the ways in which we communicate and access knowledge, the impact of globalisation and awareness of climate change, the UK appears to be a very different country in which to grow old from even 10 years ago. As the ageing of the population adds yet another

A. Withnall (✉)

Centre for Lifelong Learning, University of Warwick, Coventry, UK
e-mail: a.withnall@warwick.ac.uk

dimension, policy responses have included recent removal of the default retirement age, changes to the State Pension and State Pension Age (set to rise to 68 for both sexes by 2046) and legislation which makes it illegal to discriminate on grounds of age in employment, education and training. The overall effects of these changes has yet to be assessed but labour market data reveal that employment rates for older people have anyway been steadily increasing since 2001, notably from 5% to nearly 10% among over 65s (Department for Work and Pensions 2013). Yet, as Withnall (2010) has pointed out, age discrimination legislation, first introduced in 2006 and subsequently incorporated into the Equality Act of 2010, has had mixed and sometimes unexpectedly negative results in respect of older people's access to education and learning opportunities notably regarding concessionary fees for non-vocational courses.

At this juncture, it should be pointed out that a particular difficulty in discussing older people's learning is the range of meanings that may be ascribed to the term including the varied perceptions of older people themselves, an issue already discussed at length by Withnall (2010), Findsen and Formosa (2011) and McNair (2012)). The latter also helpfully points out that as increasing numbers of people seek information on-line in ways that were not possible even a decade ago, a new form of independent learning is emerging. At the same time, there is growing interest in investing in skill development for older people remaining in the workplace as their value to the economy becomes more apparent. This suggests that we need to be ready to be flexible in our understanding of what learning is and to be prepared to incorporate a range of views into our discussion as perceptions change. Similar debates prevail over the interpretation of education in this context; as discourses of lifelong learning come to replace the more traditional thinking about the education of adults, it has already been suggested that we need to move towards talking about 'longlife learning' to acknowledge the ageing of the population and the need to rethink the provision of learning opportunities for older age groups (Withnall 2010). However, this is still the subject of debate since other writers feel that notions of lifelong learning need not yet be abandoned (Findsen and Formosa 2011).

41.2 The Development of Later Life Learning in the UK

The history and development of later life learning and educational opportunities in the UK has been traced by a number of commentators. As Findsen and Formosa (2011) have shown, the recognition of the need to make more opportunities available to the retired population grew from three interrelated factors during the 1960s and 1970s – acknowledgement of low rates of participation by older people in adult education, growing awareness of the need for pre-retirement education and what Glendenning (2000) has called 'the education and older adults movement'. In fact, it was Glendenning who was largely responsible for bringing together a diverse range of academics, practitioners and researchers in a series of seminars held at Keele University in the early 1980s to discuss the state of and prospects for older

people's education. These seminars culminated in the founding of the Association for Educational Gerontology, renamed the Association for Education and Ageing (AEA) in 1985. The Association launched a journal which initially had a small circulation but it now produces an *International Journal of Education and Ageing* which has succeeded in attracting papers from a diverse range of authors all over the world. AEA has retained a small but active membership and has collaborated with a range of other organisations to mount a series of annual conferences, including international events, as well as occasional consultative events with groups of older people themselves. It has been instrumental in providing a focal point for academics, researchers and practitioners working in later life education and in sharing knowledge and information (see www.associationforeducationandageing.org).

The 1980s also saw the development of a number of other initiatives including the Forum on the Rights of Elderly People to Education (FREE), a group of enthusiastic people who worked tirelessly to raise awareness and interest in the issues and to share information about activities. FREE produced a Manifesto which enshrined what were seen as the educational entitlements of older people but this did not have the intended impact and FREE eventually disbanded (Withnall 2010). We can also point to the founding of the government funded Pre-Retirement Association (PRA) following an important investigation into the nature of existing pre-retirement education by Phillipson and Strang (1983). The PRA aimed to make both employers and employees aware of the need to plan for retirement and the changes it would bring through tailored educational programmes and research aimed at those older people nearing retirement. Now renamed the Life Academy, the organisation operates as an independent consultancy and provides financial education and employee engagement programmes with an emphasis on life planning. This period also witnessed the involvement of the National Institute of Adult Continuing Education (NIACE) in later life learning through one strand of the work of its Unit for the Development of Adult Continuing Education (UDACE). This work culminated in the publication of a handbook to guide local authorities and other agencies interested in developing opportunities for older learners (Harrison 1988) although its impact was not explored.

NIACE subsequently revived its interest in later life learning with the Older and Bolder initiative, a national development programme which ran from 1995 until 2006. Withnall (2010) has shown how the Older and Bolder team worked tirelessly to make a strong case for public investment in later life learning as well as raising awareness across a number of government departments and other agencies of how the availability of educational opportunities in later life might help to improve the overall quality of life for older people. NIACE has continued to highlight issues concerned with older people's learning notably through a series of surveys into over 50s' learning with that carried out by McNair (2012) being the most comprehensive to date.

Findsen and Formosa (2011) have commented on the absence of UK Universities from any involvement in later life education since this was never part of their mission unlike higher education institutions elsewhere. A notable exception was the Learning in Later Life Programme set up at the University of Strathclyde in Glasgow

in 1987, mainly through the initiative of staff member Lesley Hart with the enthusiastic backing of the then Principal. Known for some years as the Senior Studies Institute, the Programme was initially small-scale but grew quickly and is now one of the largest of its type in the world and is unique in the UK in that it offers a huge variety of courses and activities for older people with classes available mainly in the daytime. There are also opportunities for volunteering and for personal and social development. The Programme is now part of the University's Centre for Lifelong Learning and like some of the other courses offered by the Centre, certain classes offered carry credit which is benchmarked at undergraduate level and on the Scottish Credit Qualifications Framework at Level 7. This may be a timely development in that many of the older students are now keen to develop new skills and interests in order to re-enter the labour market whether in a voluntary or paid capacity (see www.strath.ac.uk).

The last four decades have also seen a plethora of other initiatives, some very small-scale or short-lived which have nevertheless contributed to the expansion of educational opportunities for older people across the UK although these have not been uniformly available since core funding and sustainability is always an issue. The Older and Bolder Programme was instrumental in revealing the breadth of activity taking place and in encouraging new initiatives. For example, we can identify health-related projects, museum based activities, neighbourhood projects, action groups, learning for housebound older people, telephone discussion groups, craft activities in day centres, arts based and local history projects and more recently, some emerging work with those in residential care which will be discussed later. There are also some examples of developmental work with ethnic minority elders. In Northern Ireland, the Workers Educational Association (WEA-NI) was particularly active in developing educational activities for disadvantaged older people across the province with some initial financial support from an American philanthropic organisation. It was also involved with education for older men as well as acting as a partner in a range of European Union funded projects concerned with later life education but has sadly now ceased to exist.

Whilst these initiatives give a flavour of some of the developments witnessed in the UK, it has to be acknowledged that probably the most influential development of the 1980s which has continued to flourish and expand is the University of the Third Age (U3A), conceived in the UK as a self-help educational organisation for people no longer in full-time employment and providing educational, creative and leisure opportunities in a spirit of mutual co-operation. It is run entirely on a voluntary basis and members may be both learners and teachers.

The objectives and principles under which U3A operates in the UK were set out by one of its founders, the late Peter Laslett, first published in 1981 and slightly amended in 1984. Although local branches operate independently, they are members of The Third Age Trust and agree to abide by the original principles. Learning and teaching takes place at low cost in small groups, often held in members' homes. Currently, there are 915 U3As operating throughout the UK with some 320,521 members; a 2013 Interest Group Survey revealed that there are in excess of 36,000 U3A interest groups with walking, history and 'going out' the most popular activities

although bus restoration, Druidism and unsolved murder mysteries are among some of the more unusual subjects on offer (www.u3a.org). More recent activity has seen the organisation of summer schools, special lectures, concerts, and shared learning projects with other organisations. In the some regions, members are increasingly involved in research projects with local universities (Whitehouse 2014).

There is no doubt that the British model of U3A has been successful with membership increasing considerably in recent years as many local authorities and universities have been compelled to cut their non-vocational educational provision for adults in general as funding has gradually been withdrawn. However, U3A might be criticised in that it is very much a middle class movement, often appealing to those who have already benefited from a range of educational opportunities. Withnall (2012a) also notes that its self-help philosophy might not appeal to all potential older learners. In a critique of the University of the Third Age movement in general as it has developed in different parts of the world, Formosa (2014) notes a strong gender, social class, ageist and ethnic bias. He suggests that U3As need to develop a broader vision of learning, teaching and curricula as well as a more inclusive wider participation agenda, a comment that may well apply to the British model.

41.3 What Is the State of Older Adult Education Today?

41.3.1 Active Ageing

So far, we have concentrated mainly on the development of educational activities involving people no longer wholly engaged in the labour market. Indeed, as awareness of demographic trends has become a reality across Europe and beyond in recent years, the importance of learning for personal, social and civic purposes coupled with an emphasis on ‘active ageing’ (World Health Organisation 2002) including opportunities to learn as promoted through the European Commission’s most recent programmes, has come to receive wide recognition. Although the UK has never had a uniform national strategy for active ageing, over the last decade successive national governments have produced a range of policy documents focused on increasing the health and well-being of older people in general; yet whilst there have been some oblique references to the importance of educational opportunities as a facet of active ageing, this has not been matched by any increase in provision nationally. It is also noticeable that many of these reports have emanated from government departments other than those concerned with education as Withnall (2010) has observed.

Excluding financial considerations, one possible explanation for this is the lack of robust research evidence as to the benefits of learning in later life. Although there is a whole range of anecdotal evidence as to how learning can improve physical and mental health, offset some of the problems of ageing and build self-confidence, Jenkins (2011) has shown that concrete evidence regarding the health and social benefits remains somewhat limited. Nevertheless, within the devolved administra-

tions, there are promising signs that governments are prepared to take action. For example, the Scottish Executive set out its comprehensive vision for an ageing Scotland in 2007 with an action plan which included reference to later life learning. Particularly notable aspects included provision for older people to have access to information technology and to be able to access learning opportunities whether for vocational purposes or for personal development (Scottish Executive 2007). In Wales, the Welsh Government has recently published its *Strategy for Older People in Wales 2013–2023* which includes recognition of the need for older people to enjoy an improved quality of life through good physical, mental and emotional health and well-being; opportunities to be engaged in lifelong learning and other appropriate social activities are an integral part of this (Welsh Government 2013). Northern Ireland has also produced a consultation document on its proposed active ageing strategy. One of its strategic aims – self-fulfilment – includes supporting older people to develop their potential through education, training, leisure and arts opportunities in order to maintain the development of life skills and, similarly, good health and well-being (Office of the First Minister and Deputy First Minister 2014).

All these strategy documents have as their overall purpose the need to transform attitudes to, and services for older people and to better understand issues affecting them as well as promoting rights and stressing a positive view of ageing with an emphasis on the value and contribution that older people make to their communities. Access to education, training and learning are frequently stressed as an essential ingredient of this. Additionally, all the strategy documents make provision for monitoring their proposed programmes so it remains to be seen how successfully good intentions can be translated into effective action. However, Withnall has previously warned of the complexities facing governments in striving to implement ambitious policies and of the dangers of ‘empty rhetoric’ (Withnall 2010: 14).

At this point, it is worthwhile investigating who is actually learning now, what they are learning and where. From a representative sample of 4601 people aged over 50, carried out early in 2012, McNair found that around one in five people reported some form of learning in the previous 3 years. He also noted that learners’ employment status was more influential than age itself in determining how likely people were to be learners, what they studied and the reasons they gave for learning. Those who gave employment-related reasons for learning tended to be at the younger end of the age range and come from a broader social range. They appeared to be studying mainly in the areas of health, social work and occupational health and safety; other learners were most likely to be studying languages, arts, history and literature. Interestingly, higher proportions of those aged 65–74 were studying computing than those aged 50–54 and this was also true of the retired as opposed to those still in employment. It may be that these older learners have embarked on ‘catching up’ learning if they did not use computers when at work.

McNair also found that the location of learning had changed significantly since the previous survey in 2005 in that numbers learning with publicly funded providers such as further education colleges and universities had fallen and learning was more likely to take place in work-related or in adult education settings (McNair 2012). This finding doubtless reflects changes in funding regimes described by Withnall

(2010) and particularly stemming from the *Leitch Review of Skills* (HM Treasury 2006). Following the adoption of this review's recommendations more of the adult learning budget was diverted into prescribed skills training in order to assist the UK in becoming a world leader across the whole skills spectrum. Phillipson has also commented that, although there is a dearth of information on over-50s studying on a full or part-time basis at university, there appears to have been a sharp drop in participation among this age group. The disappearance of many Departments of Lifelong Learning owing to withdrawal of funding may largely account for this together with the tripling of tuition fees for first degrees and the introduction of a new student loan scheme for students domiciled in England beginning in 2012. Various different arrangements apply in the devolved administrations. However, Phillipson comments on the popularity of some kinds of part-time and distance learning courses among older learners drawing on previous studies of institutions that specialize in this mode of provision, especially The Open University and Birkbeck College, part of the University of London (Phillipson 2013). McNair also notes the growth in numbers reporting on-line learning including the 75+ age group; these learners were more likely to be male and better educated (McNair 2012).

41.3.2 Learning and the Labour Market

As issues relating to the economic sustainability of the ageing population continue to exercise governments, more recent discussions have focused on the development of pathways into work for over-50s seeking to re-enter the labour market or to change career and ways to maintain older people in employment. As already seen, new pension arrangements will require them to remain in the workplace for much longer, potentially into their 70s; or indeed, they may wish to do so for personal reasons. Accordingly, it might be expected that the availability of training for older employees in the workplace would be a major concern. Yet reviewing the literature, Phillipson (2013) found, that with some exceptions, older workers are largely excluded from training and development opportunities and that participation tends to decline with age although Schuller and Watson (2009) point out that the occupational sector in which an older worker is employed is influential in enabling him or her to access training opportunities. There do not seem to be any gender differences in this respect. One more promising sign can be detected in McNair's 2012 survey in which he found that employers are now more likely to pay for training their older workers than previously, especially those in manual jobs, although they are less likely to support part-timers (McNair 2012). Nevertheless, in previous research, McNair et al. (2004) also found that older people were less likely than younger colleagues to receive any help from any source during a job transition.

Phillipson (2013) also comments on some evidence that some older workers may not want any training. This may be due to unhappy educational experiences earlier in life; or it may be that as Schuller and Watson (2009: 38) observe that 'restrictive workplaces' where jobs are boring and monotonous suppress any desire and oppor-

tunity to learn. Phillipson (2013) makes a number of sensible suggestions for a more inclusive employment-based training policy including a legal entitlement to learn, better and more imaginative use of computer based learning and obligations on employers to expand training opportunities especially where they are creating non-standard types of jobs. Currently, The Third Age and Employment Network (TAEN), a network of member organisations with an interest in age and employment issues, is collaborating with the United States based AARP to promote their award for organisations outside the USA who implement best practice and policies for attracting and retaining older workers. Lifelong learning and training opportunities are some of the factors to be taken into account as well as support for career development (see www.taen.org.uk). Nevertheless, there is still a considerable amount of work to be done in encouraging both employers and older employees of the value and importance of workplace training. In addition, further research is needed into the kinds of training techniques that would be most beneficial to older people in different sectors in the UK bearing in mind their current levels of skill and their previous work experience.

41.4 What Is the Future for Older Adult Education in the UK?

We have seen that there has never been an overall active ageing strategy in the UK and there is no central funding for later life education and learning, nor is this likely in the future even though a number of government and other policy papers have stressed the benefits of enabling older people to have access to educational opportunities notably in the devolved administrations. Training for those continuing in the labour market is a major issue. However, U3A and a large number of local initiatives continue to flourish. In addition, there are some emerging trends which may come to affect how later life education may develop in future and which are worth examination. We will discuss three particular initiatives.

41.4.1 Intergenerational Learning

Firstly, although several definitions of the nature of this work have emerged, there are encouraging signs that education does not necessarily need to be age-segregated and that there are enormous benefits to developing intergenerational learning. Generally, it implies educational activities that involve two or more generations in either a formal or informal setting in which generations learn from each other although it can take a variety of forms. The history and development of this kind of learning has been traced at international level by Findsen and Formosa (2011) but in the UK, it is noticeable that the potential of intergenerational learning has already

been recognised in strategy documents produced by the devolved administrations. In Scotland, four major areas for intergenerational activity were identified; this has resulted in Generations Working Together initiative, founded in 2007 and developed by 12 organisations in partnership and working closely with the Scottish Government Age and Older People team. The programme is now managed by the Scottish Mentoring Network and provides information, delivers support and offers training events for those who are developing work in this area (see <http://generationsworkingtogether.org>).

The Scottish initiative is also supported by the Centre for Intergenerational Practice. This is based at The Beth Johnson Foundation (BJF) a large charitable organisation for older people with a base in Stoke-on-Trent in England. The aim of the Centre is to develop and support intergenerational practice as a catalyst for social change and ultimately, to ensure the emergence of stronger and more resilient communities. BJF has also been commissioned by the Welsh Assembly Government to deliver The Intergenerational Strategy for Wales in partnership with a Welsh voluntary organisation. This is known as Generations Together Wales. BJF additionally works in partnership with Northern Ireland to support the development of an innovative programme of intergenerational community engagement; and has developed work with local authorities and their voluntary sector partners to help them deliver intergenerational programmes and strategies. It now operates internationally at European level and across the globe as a founding member of the International Consortium for Intergenerational Programmes (ICIP) (see www.centreforip.org.uk).

Other examples of intergenerational learning programmes can be identified. For example, InterGen, a charity based in London but also operating in other areas, brings together older and younger people in local schools to enrich learning opportunities for different generations, raise aspirations for children and offset the isolation sometimes experienced by older people. Regular evaluations of activity are carried out and ideas for how InterGen can move forward are suggested based on feedback (Raynes 2011). Following on from this, a new charity, From Generation to Generation: FG2 is about to be launched and will hopefully enable more sustainable intergenerational programmes to be developed in England. Other UK organisations have participated over the years in European Commission (EC) funded programmes with partners in other countries which has enabled the sharing of knowledge and expertise. For example, the Teddybear project enabled older learners taking part in reminiscence programmes to link up with young people studying twentieth century history in the UK, Finland and Italy. This project was recognised by the EC as one of the most significant and successful in its Grundtvig portfolio 2002–2007 (see www.e-c-a.ac.uk/teddybear).

As a way of challenging ageism, confronting intergenerational misunderstanding, improving the quality of life of older people and helping to bring about better community cohesion, intergenerational programmes as they have so far been developed in the UK appear to offer significant benefits for learners of all ages. However, as Findsen and Formosa (2011) have argued, intergenerational learning still faces a

number of challenges – the need for a methodological framework, a consensus as to what constitutes good practice, how to involve other generations, better training for volunteers and others professionally involved and the emerging issue of how to develop cultural awareness especially in multi-ethnic communities. At a practical level in the UK, there is always the issue of funding where charities are instigators of local programmes. If these difficulties can be confronted and at least partially resolved, intergenerational learning appears to offer an exciting vision for the future not just of later life education but as way of expanding the horizons of younger people too.

41.4.2 Older Adult Education in Long-Term Care Settings

Secondly, as of 2012, there were estimated to be about 431,500 older and disabled people in residential care (including nursing care) in the UK with over 95% of residents being over the age of 65 (Age UK 2013). Although life expectancy differs slightly within the four countries of the UK, the number of people over 75 years of age is projected to double within the next 30 years (ONS 2009). By no means all will require residential care but as Schuller and Watson (2009) have pointed out, this stage of life implies some degree of dependency and poses notable challenges to the meaning and aims of lifelong learning, especially in view of the diversity of the older population. Yet until very recently, educational opportunities for older people who had entered residential long-term care had been considered only superficially in the UK; Findsen and Formosa (2011) offer a brief overview of some early initiatives. As awareness of population projections grows, there is now a little more interest in how older people in long-term care who may have various degrees of physical and/or mental frailty might benefit from the introduction of educational activities and what form these should take.

Withnall (2012b) has provided a comprehensive overview of some of the issues to be considered in relation to education and learning in residential care, advocating a holistic approach to learning. She suggests that this should involve the adoption of an open system framework in which the overall goal is to maximise each resident's independence and well-being for as long as possible through the availability of appropriate opportunities to learn. However, she points out that it is necessary to understand how the external environment, the prevailing philosophy of care, available resources, structures and processes and personnel interact within a particular care environment in order for that goal to be attained. It also has to be acknowledged that each home is a dynamic entity undergoing constant internal change and influenced by change in external factors; and learning will have different meanings for residents depending on the nature and degree of disability.

An American company, *Sunrise Senior Living* which appears to partially subscribe to this approach, has set up 27 residential communities with over 2000 residents in the UK. Although there have been no evaluations of its efficacy other than

statutory inspections by the Care Quality Commission which is legally responsible for this under the Health and Social Care Act 2008, each community offers at least five activities each day through specially trained activities teams so that residents have the option to enjoy a stimulating and enjoyable social life. Each community also offers a Reminiscence Neighbourhood to ensure that residents with Alzheimer's or other forms of dementia receive appropriate stimulation. The overall aim is 'to nurture the spirit' (see www.sunrise-care.co.uk) However, the cost of living in a Sunrise community is considerably higher than in the average residential home which suggests that this option would not be open to older people lacking a substantial retirement income.

There are other examples of individual homes which have provided rich and innovative examples of different types of learning activities for their residents (Aldridge 2009). Two recent developments deserve particular recognition. The first is First Taste Arts, a charity mainly operating in the Derbyshire Dales area of England. It promotes arts, musical and associated educational activities for frail older people in residential care and in day centres in the area by developing the skills of care staff. First Taste Arts has also ventured into intergenerational work with older pupils from a local school and has begun a programme to help care staff understand the potential of computer use for residents. It has close links with local authorities and health services as well as a range of voluntary organisations and stakeholder groups. It has already contributed to a range of local, national and international conferences and received the Queen's Award for Voluntary Service in 2009 (see www.firsttastecharity.co.uk).

The second organisation worthy of mention is Learning for the Fourth Age (L4A) which also provides learning opportunities for older people in care. It is a not-for-profit company limited by guarantee and funded from various local and national sources including the National Lottery. Using trained volunteers, often local students, as one-to-one mentors and appropriate multimedia resources, the objective is to enable older people to follow up existing interests or develop new ones taking into account their physical needs. The overall aim is to demonstrate the value of education as a tool for increasing well-being and confidence and to give residents a more positive outlook on life as well as delaying the onset of dementia. L4A currently operates in the city of Leicester and the surrounding county and has also received a range of awards for its activities (see www.l4a.org.uk).

Careful regular evaluations of activity in these and various other schemes together with observational and anecdotal evidence suggest that bringing educational and learning activities into care homes has considerable beneficial outcomes for residents as well as for staff and volunteers. However, in some other cases, there is a danger in placing too much reliance on self-reported outcomes and in the somewhat exaggerated claims sometimes made in relation to the perceived benefits of introducing educational activities into care homes. Much more research is needed into how learning can be better understood in different care contexts and consideration given to more rigorous methods of evaluation whether at individual or group level.

41.4.3 Massive Open Online Courses

Thirdly, perhaps the most exciting recent innovation has been the introduction of Massive Open Online Courses (MOOCS) into the UK as an addition to existing forms of online distance learning. Already available through US platforms Coursera, Udacity and Edx, UK based courses have been promoted since 2013 through Futurelearn, a private company owned by the Open University in partnership with a wide range of prestigious UK universities. The courses offered are for anyone of any age, are usually a few weeks in duration and are currently free. At present, they do not offer awards and are very flexible since the online nature of their delivery means that it is not necessary to adhere to a particular timescale and resources can still be available after the course has technically finished (see www.futurelearn.com).

The online learning format is usually that of video presentations and text with links to other resources where appropriate with simple quizzes or tests but there is also considerable emphasis on collaborative and peer learning through online discussion. As yet there is no information as to how far MOOCS have proved attractive to older people but they offer the opportunity to participate in a range of ways. Limited research to date suggests that learners mostly report satisfaction from studying a MOOC even if they do not complete the course although their initial reasons for studying a particular topic may be very different with some learners being ‘lurkers’ or ‘passive consumers’ (Haggard 2013). The same author points out that the kinds of literacies and skills required to complete a MOOC are quite specific. Certainly, students would need to be confident users of computers and be prepared to try learning in what may be an unfamiliar way with no face-to-face interaction with either the tutor(s) or other learners. Nevertheless, as more people become familiar with new forms of technology, they may be happy to experiment with new modes of learning as they move into later life. Although MOOCS are still subject to considerable criticism, notably that they suffer from a range of weaknesses concerning, for example access and quality of learning (Haggard 2013), they do offer a way forward especially for older people who are not confident in a traditional group or who are housebound.

41.5 Conclusion

It has been seen that, as the UK consists of four countries, progress with older adult education has been somewhat uneven. It is also true to say that over the last four decades or so, the nature of later life learning has evolved in line with demographic change and with regional, national and international developments and influences. However, in spite of recognition of the ageing of the population and the importance of encouraging later life education for more and different older people and with a range of purposes, it still falls largely to the voluntary sector to organise and offer

provision. All too often, this is with somewhat limited resources and with no overall grasp of how effective, equitable or sustainable this kind of provision really is. There is also a crying need for the development of more robust policies on workplace training for over-50s as they remain in the labour market for longer; and to consider in more depth just what kind of educational opportunities can assist older people in care settings to continue to lead independent and fulfilling lives. At the same time, there are signs that digital technology will be able to offer new and different ways of learning for those who can develop the required literacies and skills. As thinking about older adult education in the UK continues to evolve, what is now needed is more comprehensive research into the benefits that later life learning can bring for individuals, their communities and society in general; and a clearer understanding of the policy implications at a time of economic stringency. Plenty of challenges remain.

References

- Age UK. (2013). *Later life in the United Kingdom*. <http://www.ageuk.org.uk>. Accessed 19 Dec 2013.
- Aldridge, F. (2009). *Enhancing informal adult learning for older people in care settings: Interim report and consultation document*. Leicester: NIACE.
- Department for Work and Pensions. (2013). *Older workers statistical information booklet 2013*. London: Department for Work and Pensions.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life*. Rotterdam: Sense Publishers.
- Formosa, M. (2014). Four decades of the University of the Third Age: Past, present and future. *Ageing and Society*, 34(1), 42–66.
- Glendenning, F. (2000). Some critical implications. In F. Glendenning (Ed.), *Teaching and learning in later life: Theoretical implications* (pp. 13–24). Aldershot: Ashgate.
- Haggard, S. (2013). *The maturing of the MOOC: Literature review of massive open on-line courses and other forms of on-line distance learning* (BIS research paper number 130). London: Department for Business, Innovation and Skills.
- Harrison, R. (1988). *Learning later: A handbook for developing educational opportunities with older people*. Leicester: UDACE/The Open University.
- Jenkins, A. (2011). Participation in learning and wellbeing among older adults. *International Journal of Lifelong Education*, 40(3), 403–420.
- McNair, S. (2012). *Older people's learning in 2012: A survey*. Leicester: NIACE.
- McNair, S., Flynn, M., Owen, L., Humphreys, C., & Woodfield, S. (2004). *Changing work in later life: A study of job transitions. Report commissioned by SEEDA*. Guildford: University of Surrey.
- Office for National Statistics. (2009). *National population projections, 2008-based*. London: UK Office for National Statistics.
- Office for National Statistics. (2013). *Mid-2012 population estimates, 2012-based*. London: UK Office for National Statistics.
- Office of the First Minister and Deputy First Minister. (2014). *Active ageing strategy 2014–20. Consultation document*. <http://www.ofmdfm.gov.uk/active-ageing-strategy>. Accessed 27 Feb 2014.
- Phillipson, C. (2013). *Ageing*. Cambridge: Wiley.
- Phillipson, C., & Strang, P. (1983). *The impact of pre-retirement education*. Keele: Department of Adult Education/Keele University.

- Raynes, N. (2011). *Intergen review of practice and performance February-March 2011*. <http://www.raynes-n-2011-intergen-review-of-practice-and-performance-full-report>. Accessed 15 Mar 2014.
- Schuller, T., & Watson, D. (2009). *Learning through life: Inquiry into the future for lifelong learning*. Leicester: NIACE.
- Scottish Executive. (2007). *All our futures: Planning for a Scotland with an ageing population*. Edinburgh: Scottish Executive.
- Treasury, H. M. (2006). *Leitch review of skills: Prosperity for all in the global economy – World class skills: Final report*. London: HM Treasury.
- Welsh Government. (2013). The strategy for older people in Wales 2013–2023. Strategy document. <http://www.cymru.gov.uk>. Accessed 15 Mar 2014.
- Whitehouse, J. (2014). The University of the Third Age. *Association for Education and Ageing Digest* (41). <http://www.associationforeducationandageing.org/about-us.html>. Accessed 1 Apr 2014.
- Withnall, A. (2010). *Improving learning in later life*. London/New York: Routledge.
- Withnall, A. (2012a). Lifelong or longlife? Learning in the later years. In D. N. Aspin, J. Chapman, K. Evans, & R. Bagnall (Eds.), *Second international handbook of lifelong learning. Part 2* (pp. 649–664). London/New York: Springer.
- Withnall, A. (2012b). Lifelong learning in long-term care settings. In P. Jarvis & M. Watts (Eds.), *The Routledge international handbook of learning* (pp. 160–167). London/New York: Routledge.
- World Health Organisation. (2002). *Active ageing: A policy framework*. Geneva: WHO.

Chapter 42

United States

Ronald J. Manheimer

42.1 Emergence of Older Adult Education in the United States

The growth of learning opportunities for older adults in the United States can be understood as a response to the dramatic increase in the percentage of the country's older citizens; the rise in levels of educational attainment in the decades following World War II; improvements in the health, economic security, and longevity of the older population; an outgrowth of the adult and continuing education movement advocating the benefits of lifelong learning; and the contributions of gerontological researchers underscoring the value of intellectual stimulation as fostering the individual's capacity to stay informed and engaged in society (Manheimer 2009). From a historical perspective, the growth of older adult education was a reflection of health, public policy, and socio-economic changes. Life expectancy at birth in the United States rose steadily from 49 in 1900 to 78 in 2013. At the same time, the number of years one could expect to live upon reaching age 60 increased from 14 in 1900 to over 22 years in 2013. The generation that came of age during World War II benefitted from federal legislation which enabled millions of veterans to attend colleges and universities, many the first in their families. So while 4.6 % of United States citizens had completed four or more years of college in 1940 that grew to 11 % by 1970 reaching close to 30 % by 2010 (United States Census Bureau 2010). This is a crucial statistic in older adult learning since educational attainment is the strongest predictor of continued participation throughout the life course (Merriam et al. 2007).

R.J. Manheimer (✉)

NC Center for Creative Retirement (now Osher Lifelong Learning Institute), University of North Carolina, Asheville, NC, USA

e-mail: ronaldmanheimer@gmail.com

Growing affluence in the United States led to the development of an unprecedented well-educated middle and upper middle class. Dramatic changes in perception of the retirement years (from 'disengagement' to 'productive ageing') led to rising expectations about the role of an older person. Consequently, when the veterans' generation reached retirement age, many of its members welcomed (and in some instances advocated for) continued learning opportunities for both personal enrichment and enhancement of skills. Even before that, the requirements of continuing professional education in fields as diverse as real estate and medicine and the need or desire to remain in the workforce through one's 60s and even 70s also drove midlife and older learners to access formal, credit bearing courses at institutions of higher education. These trends are reflected in rising annual participation rates of those aged 55 and above. For example, 2005 census data reveal that for persons aged 65-plus, 19 % pursued personal interest courses, 5 % work-related courses, and 0.3 % a degree or diploma. For those aged 55–64, 21 % enrolled in personal interest courses, 27 % in work-related and 2 % in a degree programme at some type of institution of higher education (United States Department of Education 2007).

The adult education movement's interest in older adults can be traced to 1949 when a *Committee on Education for Aging* was established under the Department of Adult Education of the professional organization, the National Education Association (NEA). Becoming part of the Adult Education Association of the United States in 1951, this committee produced a descriptive book on educational programming for older adult learners, *Education for later maturity: A handbook* (Donahue 1955). Legislation that grew out of the Johnson administration's Great Society mandates also produced the Older Americans Act of 1965 that included funding to support a national network of multipurpose senior centres. At first, senior centre curricula focused on arts and crafts, exercise classes, musical choruses, dancing, bingo and, for meal sites, healthful nutrition. Gradually, education in senior centres came to include courses in history and literature, genealogy, creative writing and drama, though offerings varied widely from one centre to another.

The 1960s and early 1970s saw older adult education furthered by developments in gerontology and public policy on ageing driven by various senior advocacy organizations. For example, as an outgrowth of the 1971 *White House Conference on Aging*, a once-a-decade conference sponsored by the Executive Office of the President of the United States which makes policy recommendations to the president and Congress regarding the aged, the United States Administration on Aging awarded a 2-year grant to the American Association of Community and Junior Colleges to explore ways for community colleges to highlight the needs of older persons and contribute to their quality of life. In addition, several community college systems tapped new funds made available through Title I of the Higher Education Act of 1965 and Title III of the Older Americans Act of 1965 to hire coordinators or part-time programme directors to design and implement courses for seniors.

The older learner movement was not linear in development. The so-called 'failure model' of ageing focusing on the decrements associated with growing old still

prevailed during this period. Consequently, providing knowledge and skills to cope successfully with the crisis of adjustment to retirement and the change in roles of the older person was a common rationale of these early programmes (Peterson 1983). Rather than some overarching framework, the growth of older learner programmes in the United States reflects a grassroots phenomenon. New organizations and programme models emerged as independent initiatives usually prompted by visionary leaders. Programmes vary widely. Some seek to empower participants through shared leadership while others are top-down, staff directed initiatives. Some programmes are financed through foundation grants and contributions while others are sustained through fees paid by participants. Gauging participation rates is difficult since national surveys tend to collect data on need or work-based education (e.g. adult literacy, vocational and workplace education) using broad age decrements (e.g. 50-plus) while national data for participation in not-for-credit, enrichment-oriented programmes is almost non-existent.

42.2 Types of Programmes and Host Institutions

The following section highlights some of the longest running lifelong learning programmes that came into existence in the United States since the mid-1970s.

42.2.1 Lifelong Learning Institutes

College and university-based Lifelong Learning Institutes or LLIs arose in the mid-1970s in part influenced by a prototype, the Institute for Retired Professionals (IRP) initiated by a small group of retirees in 1962 at the New School for Social Research (now New School University) in New York City. The IRP invited individuals seriously interested in intellectual subjects and willing to join small study circles based on specific scholarly pursuits to which they would contribute in turn. Over a decade would pass before a handful of similar member-led educational programmes appeared in the mid-1970s. But by the mid-1980s there was a sharp rise in the rate of new programmes started each year until, by 2013, there were more than 400 of these programs across the United States, most of them linked to colleges and universities. Diverging from the British and French University of the Third Age, the majority of the American LLIs favour an expert-led format rather than collaborative study circles, and often draw on members as volunteer instructors or facilitators (Manheimer 2005).

LLIs are unique not only because members are partially or fully in charge (host institutions may provide space and some support at the administrative and clerical levels) but because they are based on a financial model that requires participants, besides providing free labour and leadership, to help pay for a portion of the cost of their own continuing education. At the time of the model's inception, the idea that

older learners should pay some portion of the cost of their own education was unprecedented. Previously, older learner programmes were free to participants thanks to private and public foundations or government grants and subsidies. That earlier funding basis explains why programs were so often episodic (starting and ending with each grant) and lacked an enduring infrastructure. Perhaps the self-financing business model of most continuing education departments influenced LLIs where, institutionally, they are most often organizationally situated.

For many years, the network of LLIs was loosely linked through affiliation with the Elderhostel Institute Network (EIN), a consortium supported, in part, by the travel-learning program, Boston-based, Elderhostel (renamed in 2004 as Road Scholar). Beginning in 1988, EIN made available experts who travelled the country helping groups improve or organize LLIs. EIN eventually produced an extensive website that included a clickable map with links to member programmes in the United States and Canada, posted monthly newsletters, and provided extensive material on curricula, by-laws, and how to start an LLI. After several years of letting it languish, in 2013, under its new name, Road Scholar Institute Network, the host organization began to revive and update the website accessible as www.roadscholar.org/n/institute-network-lifelong-learning.

A second, equally vital network of LLIs derives from the generosity of the Bernard Osher Foundation, which since 2000 has funded 122 Osher Lifelong Learning Institutes (or OLLIs). Several OLLIs have subsequently failed leaving 119 existing programmes with a total of 151,000 members as of 2015 (OLLI National Resource Center). Some of the OLLIs are completely new and others expanded versions of existing programmes. OLLIs meet annually at a national conference, share ideas and programmes through the online website, and gain the benefit of cross-fertilization and programme sharing through a national coordinating office based at the University of Southern Maine (Moved in 2014 to Northwestern University Chicago campus in the School of Professional Studies). An annual journal featuring articles from members and researchers launched in 2006, *The LLI Review*, ceased publication in 2011 after its editors found that an insufficient number of quality research-based articles were being submitted.

42.2.2 *Shepherd's Centers*

During this same fertile period that saw the rise of LLIs, we find initiation of a life-long learning component in the faith-based, volunteer-run Shepherd's Centers. Non-profit community organizations sponsored by a coalition of religious congregations, Shepherd's Centers are committed to the delivery of services and programmes for older adults. In 1972, Dr. Elbert C. Cole in Kansas City, MO, founded the first Shepherd's Center. Twenty-three churches and synagogues joined in an interfaith effort to provide a ministry by, with and for older adults. At its high point in the mid-1980s, 88 local organizations belonged to the Shepherd's Centers of American. Today, 60 Shepherd's Centers in 21 states comprise a network of 9700

volunteers serving over 34,000 older adults. The services and programmes of the Shepherd's Center are designed to empower older adults to lead creative, productive, meaningful, and interdependent lives.

One of the many programmes offered by the Shepherd's Centers is the Adventures in Learning programme, which utilizes older adults as teachers and students, planners and participants. Classes are normally held weekly, bi-weekly, or monthly. The purpose of this educational programme that currently reaches over 27,000 people is to provide an environment where older adults may share their knowledge, talents, skills, and new interests with their peers. A committee of volunteers makes the programme decisions regarding curriculum, faculty, marketing, and evaluating. This committee is composed of faculty and students with backgrounds in education, public relations, administration, the arts, health, and clerical services. Most of the teachers are older adults who volunteer their time, knowledge, and skills.

42.2.3 OASIS

In 1982, arts educator Marylen Mann approached leaders of the May Department Stores Company headquartered in St. Louis, MO, with a proposal for department store-based health and education programmes for seniors. Initial support for the programme was provided by the Administration on Aging. Educational, cultural, health, and volunteer outreach programmes are offered at the OASIS Centers to provide participants an opportunity to remain independent and active in community affairs. In 2005, Federated Department Stores bought out The May Company and inherited the OASIS programme, which it continues to support in partnership with BJC HealthCare. OASIS is a consortium between business, not-for-profit and health care organizations designed to challenge and enrich the lives of adults 50 and older.

The OASIS national office establishes programme quality requirements and overall management and operations guidelines. Currently OASIS Centers are active in 43 United States cities, serving 59,000 members. Each Centre has permanent and specially designed space for offices, student lounges, and meeting rooms. Courses are offered in areas of visual arts, music, drama, creative writing, contemporary issues, history, science, exercise, and health. Many courses are held in collaboration with local medical, cultural and educational institutions. Volunteer outreach is an important component of the OASIS programme. Many participants are trained to provide support to age peers, to teach classes in the community, and to work in intergenerational tutoring programmes helping young children. In 2012, more than 7900 volunteers gave over 505,000 h of their time to OASIS school tutoring programmes (OASIS 2013). As an aside, it is worth noting that the name OASIS was originally used as an acronym for Older Adult Services and Information Systems but, as with many organizations seeking to deflect ageing stereotypes and sound less like a social service agency, it changed the name to just OASIS and changed its tag line from 'Enriching the lives of mature adults' to the more inclusive and upbeat 'Discover life after 50'.

42.2.4 *SeniorNet*

In 1986, SeniorNet, based in San Francisco and with initial support from the Markle Foundation, was established through the initiative of educator Mary Furlong to encourage older learners to discover the benefits of computer-based information, communication and the creative use of computer software. Today, SeniorNet is staffed by more than 3000 volunteers supported by a small, paid national staff with a budget of over \$1 million (United States Dollars) and has almost 65 Learning Centers in the United States, including Indian Reservations and underserved areas. A Spanish language SeniorNet site was established in Corpus Christi, Texas, in 2007. Membership dues, Learning Center fees, donations of individuals and support and sponsorship of corporations and foundations help to fund SeniorNet.

42.2.5 *Senior Centers*

During the 1970s, with funding and mandates based on the Older Americans Act, the ‘multiservice’ senior centre concept began to flourish. Activities and services available at approximately 11,400 local, city and county-funded centres serving more than one million older adults include hot meals and nutritional education, health education, employment services, transportation assistance, social work services, educational activities, creative arts programmes, recreation, leadership, and volunteer opportunities. The recreation-education component of senior centre programming varies with availability of community resources and interests of participants. Some of the more common activities include arts and crafts, nature studies, science and outdoor life, drama, physical activity including Tai Chi and Yoga, music, dance, table games, special social activities, literary activities, excursions, hobby or special interest groups, speakers, lectures, movies, forums, round tables, and community service projects. Most senior centre educational programs are free or at little cost. Senior centres receive funding from multiple sources including local governments and through various state and federal entitlement programs as well as philanthropic gifts. Approximately 70 % of senior centre participants are women; half of them live alone. The majority are Caucasian, followed by African Americans, Hispanics, and Asians respectively. The average age is 75 (National Council on Aging 2013).

42.2.6 *Elderhostel (Road Scholar)*

Two collaborators – Marty Knowlton, a world-travelling, free-spirited social activist and former educator, and David Bianco, a highly organized university administrator, founded Elderhostel. Launched in 1975 at the University of New Hampshire as

an inexpensive, week-long, campus, summer residency programme for people 55 and over, Elderhostel grew quickly and spread throughout colleges and universities in the United States and then abroad as a year-round programme. Elderhostel typifies those lifelong learning ventures launched without any serious feasibility study, rather through the visionary leadership of a couple of innovative individuals.

Initially intended as a travel-learning programme that might provide a taste of college-level intellectual life to those who had not been able to or could not afford to attend college, the programme has mainly attracted college graduates (a large percentage of whom are either former teachers or spouses of teachers). What began as a modest experiment with a social mission, Elderhostel quickly turned into a (though non-profit) big business. Because Elderhostel now has many competitors, it must strive to update its image in order to attract a new generation of increasingly sophisticated and discriminating consumers. In 2004, Elderhostel launched Road Scholar, a set of more physically challenging, smaller group tours designed to attract a somewhat younger midlife population. Eventually, the Road Scholar name completely replaced Elderhostel. With its new brand name, the non-profit organization has managed to survive in the face of competition and an ageing clientele. In 2012, the organization reported that about 100,000 people had participated in the programme (Road Scholar 2012).

42.2.7 Senior Theatres

The education and performing art scene is as extensive and lively as other types of older learner programs. Hundreds of mature adult performing arts groups are listed in *Senior Theatre Connections* (Vorenberg 1999), testifying to the international popularity of older person's participation in the arts and in intergenerational arts activities. The number of senior theatre 'companies' has grown from 79 to 791 in the period 1999–2010 (Senior Theatre Resource Center 2012). In addition, the National Center for Creative Aging (NCCA) hosts a creative arts and ageing network that includes programmes in scores of major cities across the United States. In 2007, together with the New Jersey Performing Arts Center, NCCA published *Creativity matters: The arts and aging toolkit* (Boyer 2007) to help groups across the United States and abroad to design, implement and evaluate professionally led senior arts programmes. More recently, the United States National Institute on Aging (a division of the National Institutes of Health), has funded a theatre training programme for older adults as part of a national initiative to link community arts programmes with academic researchers to determine the health benefits of participation in arts programming (National Institute on Aging 2013).

42.2.8 Community Colleges

As mentioned earlier, community colleges have served older learners for decades, not necessarily through special age-segregated programmes but through regular courses offered to the general adult public. Many community colleges offer reduced fees to people over age 60, 62 or 65, depending on college policy.

An important recent innovation coming through the community college network is the American Association of Community College's 'Plus 50' Initiative. The project began in 2008 with funding from The Atlantic Philanthropies and involved 15 community colleges focusing on learning, training, and retraining and civic engagement for baby boomers. The economic recession hit after the programme launched and put many baby boomers out of work for lengthy periods of time. Recognizing that people age 50 and over wanted to come back to college and retrain for new careers so they could improve their job skills and get back to work, organizers modified the programme in 2009 to focus more intensively on helping people 50 and over to prepare for new jobs and careers. The programme's success prompted the AACC to expand the programme to 100 community colleges reaching more than 24,000 students as of 2013.

In 2004, the professional trade association, American Council on Education (ACE) launched an ambitious project, titled 'Older Adults and Higher Education', to study key questions about the composition of older adults in the United States and their motivations, needs, and obstacles to higher education. A report, *Framing New Terrain* (2007), lays out potential areas in which institutions of higher education could improve their outreach and offerings for this expanding group of learners. Recommendations include resources for overcoming financial barriers, availability of senior waiver programmes, appropriate scheduling and access through public transportation, peer mentoring including computer literacy assistance.

42.3 Other Sponsors and Resources

To this array of programmes, we must add other host sites, such as at community colleges, the Young Men's Christian Association and Young Women's Christian Association, Jewish community centers, art museums, hospital, and trade unions that have attracted large numbers of people in their 50s, 60, and 70s to partake in educational opportunities not specifically targeted to people by age or stage of life, or at least not identified as such. State legislation, mainly initiated in the early 1970s, has enabled thousands of citizens above a designated age (usually 65 but sometimes 62) to attend regular college and university classes on a tuition-free, space available basis. Work related educational programmes sponsored by major companies constitute another large resource for people in midlife as part of retraining, upgrading of technical and managerial skills, and to a lesser extent as part of preparation for retirement.

Opportunities for independent learners to engage in continued learning about on the Internet for all age groups. According to the Pew Research Center, Internet use among American adults aged 65-plus reached 54 % in 2013, up from 42 % in 2009 (Pew Research Center 2012). Free online courses are available through various consortia.

42.4 Sports, Wellness and Arts Competition

While not always included in discussion of education for seniors, sports and wellness programmes have become vitally important learning opportunities; especially as the Baby Boomer generation drives the evolution of education in the second half of life. Adults aged 55 and over make up the fastest growing segment of membership in fitness centres in the United States (International Health, Racquet, and Sports Club Association 2013). In many states, besides the highly popular ‘senior games’, an Olympics-like sports competition for people 55 and over, there is a ‘Silver Arts’ component encouraging everyone from painters to dancers to weavers to cheer leading teams to enter the competition and show their stuff.

42.5 Spirituality, Ageing and Lifelong Learning

Swedish sociologist Lars Tornstam (2005) proposed a theory of gerotranscendence which asserted that with age comes a radically different life outlook reflecting a cosmological shift in perception. Tornstam argued that this was a naturally occurring transition that would be more strikingly evident if our societies (including their religious institutions) gave older people sufficient encouragement and support to make this spiritual passage to a unique late life outlook.

It is around the same time that Tornstam’s articles started appearing in American journals that the spirituality and ageing movement began to grow in the United States. The New York state-based conference centre, Omega Institute started organizing ‘Conscious Aging’ conferences in 1992 with a host of high profile figures such as counterculture guru and spiritual author Baba Ram Dass (who had recently discovered his own ageing and written a book about it), Jewish mystic, Rabbi Zalman Schechter-Shalomi, social activist and Gray Panthers founder, Maggie Kuhn, and other visionaries who championed both the role of the secularly wise, politically active senior, and the ‘spiritual elder’. Though Tornstam was not part of this cast of conscious ageing advocates, his research-based theory and Eric Erikson’s model of development (Erikson 1987) supported the views espoused at these conclaves.

In the field of ageing, concurrent with this movement, the American Society on Aging (ASA) launched a new constituent unit – the Forum on Religion, Spirituality and Aging (FORSA) – that grew quickly in membership. From Rabbi

Schachter-Shalomi's (1995) book, *From Age-ing to Sage-ing*, a number of Spiritual Eldering Institutes were established to do what Lars Tornstam suggested was missing, namely to nurture older people's capacity for reaching a new level of development so that they might play new roles in society as spiritual mentors to younger generations.

The trend has also had a profound impact on expanding mainstream older learner programmes to include training in yoga, meditation, and Tai Chi, and numerous courses on comparative religion, mysticism, Chinese medicine, and ancient and modern mythology.

42.6 Leadership Programmes

The characteristics of those drawn to lifelong learning programmes – higher levels of education, relative economic wellbeing, high functionality, and prior professional experience – are the same attributes of those who are likeliest to volunteer time to social causes and civic improvement organizations and the likeliest to play leadership roles in those groups (Choi and DiNitto 2012). Lifelong learning programmes such as LLI are themselves examples of organizations that benefit from their members' contribution of time, talent and sometimes money and from the leadership members provide, whether through teaching, serving on committees or heading up governance groups.

Many LLIs promote volunteerism in their surrounding communities. A few, such as the OLLI at the University of North Carolina, Asheville, run their own leadership for seniors programmes. Graduates of Leadership Asheville Seniors play major volunteer roles in the community and use their new knowledge to start organizations and businesses.

Another exemplary leadership programme grew from findings of research conducted by the University of Maryland's Center on Ageing. Asked what would be necessary for boomer-aged adults to pursue serious involvement in volunteer activities, researchers discovered the answer: opportunities for personal growth, continued learning, participation in purposeful social networks working toward clearly defined goals, and activities that deepened their sense of meaning. Legacy Leadership Institutes (LLIs) took this information to create a programme that combined classroom and practically applied training in the art of non-profit organizational management.

This sampler is meant to indicate the range and types of programmes that came to fruition in the United States over the past 40 years. It reveals that the lifelong learning movement that seeks to attract midlife and older adults has transformed itself from operating in a social service framework (providing leisure time activities for the 'deserving elderly') to one that is more entrepreneurial, what Moody calls the 'silver industry' (Moody 2004).

42.7 Prospects for the Future

Currently, organizational leadership in older adult education is decentralized in the United States. Rarely have advocacy groups lobbied Congress or state governments to gain support for broad policy initiatives. A federal Lifelong Learning Act was passed in 1976 but funds were never allocated. There are, however, a number of national associations that have subgroups focusing on and advocating for older learners. For example, the professional trade association, American Society on Aging (ASA) has its Lifetime Education and Renewal Network (LEARN) composed of about 250 individuals whose work is associated with some form of older adult education. And the Association for Continuing Higher Education (ACHE) has its division of Older Adults. We have mentioned the American Council on Education (ACE) and the American Association of Community Colleges as periodically involved in initiatives to promote both enrichment and vocational learning opportunities for midlife and older adults.

Speculating on the near-term future (the next 10 years), as a correlate to these trends, lifelong learning opportunities will remain a function of the market place. Those who are in sufficiently good health, are motivated by having enjoyed prior years of education and can afford to enrol in programmes such as LLs, pay for travel-learning excursions, sign up for continuing education courses, register for back-to-campus alumni seminars, access Internet educational sites, and choose from among a cornucopia of other lifelong learning programmes, will reap the benefits of 'successful ageing'. Educational programming for baby boomers is now a thriving business so that deans of continuing education programmes and directors of for-profit travel-learning companies, among others, are (or should be) discovering this audience. We should expect an increase in demand for vocational education for second and third careers with likely emphasis on technical, managerial, and business-related training needs (Cruce and Hillman 2012). Also, retirement communities associated with colleges and universities should experience a surge in growth.

In the absence of any nationally mandated and funded provision for older adult education, organized learning programmes in the United States will continue to mirror the nations' competitive market system. This means barrier free access to lifelong learning opportunities in the United States is likely to remain far from equitable. Populations such as low-income, disadvantaged minorities, and older adults with less than high school completion will have fewer options than other more educated and affluent seniors. However, the 11,000+ senior centres across the United States and other partially publically-subsidized organizations will continue to provide an array of educational programming to low-income and minority seniors living in inner city and rural areas. Moreover, state-level sponsored sports, exercise and arts and crafts venues such as Senior Games and Silver Arts (supported, in part, by corporate and social service agency funding) will continue to grow in popularity. Similarly, city and county parks and recreation departments also enable millions of

underserved older adults to participate in educational programs. These and related approaches rely heavily on older adult volunteers.

Educational programmes self-identified as for elders, mature adults, for retirees, or for seniors run the risk that their clientele may age in place as their programmes will have an increasingly elderly make up. The challenge for many programmes will be how to retain a unique identity if they elect an age-neutral identity. Such programmes have the added challenge of continuing to meet the needs of their existing participants while attracting younger, perhaps more active ones. Clearly, age-segregated programmes have continued to flourish (e.g. LLIs, Road Scholar) but programmes that are not age qualified (e.g. university and community college courses) have as well. Diversity of preferences is the hallmark of the vast number of Baby Boomers entering their 60s and 70s,

Opportunities for innovation in lifelong learning will continue to beckon visionary individuals and group who recognize the importance and value of continued learning, leadership and community service in the later years.

References

- American Council on Education. (2007). *Framing new terrain: Older adults & higher education*. <http://plus50.aacc.nche.edu/documents/Reinvestingfinal.pdf>. Accessed 8 June 2013.
- Boyer, J. M. (2007). *Creativity matters: The arts and aging toolkit*. San Francisco: National Guild of Community Schools of the Arts.
- Choi, N. G., & DiNitto, D. M. (2012). Predictors of time volunteering, religious giving, and secular giving: Implications for non-profit organizations. *Journal of Sociology & Social Welfare*, XXXIX(2), 93–120.
- Cruce, T. M., & Hillman, N. W. (2012). Preparing for the silver tsunami: The demand for higher education among older adults. *Research in Higher Education*, 53(6), 593–613.
- Donahue, W. T. (1955). *Education for later maturity: A handbook*. New York: Whiteside.
- Erikson, E., with Erikson, J. M. (1987). *The life cycle completed*. New York: W.W. Norton & Company.
- International Health, Racquet and Sports Clubs Association. (2013). *Top health club trends for 2012*. <http://www.ihrsa.org/media-center/2012/1/11/top-health-club-trends-for-2012.html>. Accessed 19 July 2013.
- Manheimer, R. J. (2005). The older learner's journey to an ageless society: Lifelong learning on the brink of a crisis. *Journal of Transformational Education*, 3(3), 198–221.
- Manheimer, R. J. (2009). Lifelong learning in aging societies: Emerging paradigms. In H. L. Sterns & M. A. Bernard (Eds.), *Annual review of gerontology and geriatrics: Volume 28, 2008* (pp. 105–121). New York: Springer.
- Merriam, S. B., Caffarella, R. S., & Baumgartner, L. (2007). *Learning in adulthood* (3rd ed.). San Francisco: Jossey-Bass.
- Moody, H. R. (2004). Silver industries and the new age enterprise. *Generations*, 28(4), 75–78.
- National Council on Aging. (2013). *Senior centers: Fact sheet*. <http://www.ncoa.org/press-room/fact-sheets/senior-centers-fact-sheet.html>. Accessed 19 July 2013.
- National Institute on Aging. (2013). *At the intersection of arts and aging*. <http://www.nia.nih.gov/newsroom/features/intersection-arts-and-aging>. Accessed 1 Aug 2013.
- OASIS. (2013). *About us*. www.oasisnet.org/AboutUs/Impact.aspx. Accessed 14 Sept 2013.
- Peterson, D. A. (1983). *Facilitating education for older learners*. San Francisco: Jossey-Bass.

- Pew Research Center. (2012). *Older adults and internet use*. <http://www.pewinternet.org/Reports/2012/Older-adults-and-internet-use.aspx>. Accessed 19 July 2013.
- Road Scholar. (2012). *Annual report*. http://www.road scholar.org/ebook/2013/RSAnnualReport2012/RoadScholar_AnnualReport2012.html. Accessed 16 July 2013.
- Schachter-Shalomi, Z., & Ronald, S. M. (1995). *From age-ing to sage-ing: A profound new vision of growing older*. New York: Warner Pub.
- Senior Theatre Resource Center. (2012). Access at <http://www.seniorthatre.com/>
- Tornstam, L. (2005). *Gerotranscendence: A developmental theory of positive aging*. New York: Springer.
- United States Census Bureau. (2010). American community survey. *United States 2010 Census*. <http://www.census.gov/2010census/>. Accessed 3 Mar 2014.
- United States Department of Education. (2007). *National Center for Educational Statistics*. <http://nces.ed.gov/>. Accessed 3 Mar 2014.
- Vorenberg, B. (1999). *Senior theatre connections*. Portland: Senior Theatre Resource Center.

Chapter 43

Zimbabwe

Stanley Mpofu

There is no such thing as ‘older adult education’ in Zimbabwe. A sensible discussion of older adult learning can only be provided in the context of the broader field of ‘adult learning’. A simple definition of adult learning comes from Indabawa and Mpofu (2005, p. 5):

Any learning or educational activity that occurs outside the structure of the formal education system that is undertaken by people who are considered to be adults in their society

Accordingly, older adult learning denotes ‘any learning activity that is undertaken by people who are considered to be older adults in their society’.

According to the World Health Organization (WHO) (2001), the age of 50 marks the commencement of older adulthood in Africa, because it is considered to be a realistic representation of the working definition on the ground. Although there are local variations, the traditional African definitions of an elder are consistent with the chronological ages of 50–65 years (WHO 2001). Accordingly, for the purposes of this discussion older adulthood begins at 50.

43.1 Historical Formations

The period immediately after Zimbabwe gained independence in 1980 witnessed huge investment in education, and this greatly expanded the education system. For example, the number of primary schools rose from 2401 in 1979 to 4504 in 1989, while that of secondary schools rose from 177 to 1502 during the same period

S. Mpofu (✉)
Centre for Continuing Education, National University of Science & Technology,
Bulawayo, Zimbabwe
e-mail: mpofust@yahoo.com

(Mpofu 1997). Though forever the ‘Cinderella’ of the education sector, adult education has made significant gains since independence and has played its part to supplement and complement formal education. For example, the Zimbabwe Census Report (Central Statistical Office 2002) showed an adult illiteracy rate of only 9.08 %, compared to 63 % at independence. However, following the failure of the Economic Structural Adjustment Programme of the late eighties and early nineties, there was stagnation in economic growth resulting in reduced government expenditure in all sectors (Mpofu and Youngman 2001). This economic downturn came to a head in the early 2000s when agriculture was disrupted through the land reform programme that saw the overnight transfer of prime agricultural land from white farmers to war veterans and newly resettled farmers (Hill 2003).

Today, the country faces major challenges in all sectors. The educational gains have been wiped out. In 2000, 90 % of children went to primary school, but by 2003 the figure had dropped to 65 %, with current projections putting it around 40–50 %. Salaries have been eroded so severely that many teachers do not see the need to turn up for duty. A third have left the profession and the country altogether. School attendance has fallen and dropout rates have increased. During 2008, children ‘enjoyed’ no more than 23 days of uninterrupted schooling (Education International 2008). In some rural areas only 20 % obtain the Primary School Leaving Certificate.

The respite offered by the just-ended government of political unity was not enough to reverse the downward spiral in education. At the re-opening of schools for the third term of the 2013 school calendar, there were 22,000 (about a third of the total establishment) teacher vacancies nationwide (Chronicle, 2 September 2013). And, 35 % of those in place were unqualified.

The challenges are greater for adult education. Despite the noticeable gains of the past, adult education still lacks decisive policies with clear links to other education and training systems. Also, it lacks a clearly articulated system of accreditation and equivalence frameworks. Yet it is adult education that holds the key to development (Nyerere 2006) and, consequently, the resuscitation of the economy through a targeted and deliberate human resources development programme.

Compounding the challenges of adult education is that the able bodied and skilled have skipped the country, leaving older people and the infirm. Millions fled the political and economic meltdown that characterized the country in the past decade (Hill 2003). At least 3 million are in neighbouring South Africa. Most have established themselves wherever they are and, as such, would be reluctant to start afresh in Zimbabwe. Accordingly, Zimbabwe’s options for regaining its economic status would be to discourage the few remaining skilled people from leaving. In addition, the country must seek to retain, for much longer, the services of skilled older people who are not likely to leave. Both are achievable through a targeted and deliberate human resources development programme. Such a programme should refresh, update and upgrade the skills of the workforce particularly older adults who will have to “learn new tricks” that will enable them to continue “manning the fort” for a little longer.

43.2 Significant Organizations

The practice of older adult learning/education in Zimbabwe cannot be separated from the practice of adult education which, to a large extent, takes its cue from the study of adult education at universities. The traditional semi-distance education model on which the Department of Adult Education at the University of Zimbabwe was founded in the 1970s has not only withstood the test of time but has also shaped the training of both trainers and trainees in adult education countrywide (Mpofu 2005). To this date, the study and practice of adult education is closely aligned to vocational purposes. Both seek to enhance the effectiveness of the workforce by interspersing the training with opportunities for application of acquired skills to real life situations.

Universities continue to play a significant role in adult learning. They do so mainly through the non-formalisation of academic programmes (Mpofu 2008) which is essentially a community outreach strategy that targets that section of the adult population that is normally beyond the reach of conventional University programmes. To this end, universities have adopted several initiatives, namely, parallel classes, block release programmes, and e-learning. Each initiative seeks to enable the productive population to undergo training that will improve their work performance and productivity.

Such schemes invariably exist across universities in Zimbabwe. Examples from the National University of Science and Technology (NUST) illustrate how these schemes have been adapted for local conditions (Mpofu et al. 2008):

- (i) *Parallel classes*, as the name suggests, run parallel to conventional classes with regard to time and space. To accommodate workers, their main target, these are taught in the evenings and during the weekends. To date, nine academic programmes offer parallel classes at NUST and enrol approximately 700 students that make up about 15 % of total enrolment. Parallel programmes extend university education to people who, although eligible for normal entry, are not able to enrol for such courses due to work and other commitments.
- (ii) *Block release* programmes are targeted at workers who want to upgrade themselves without taking extended leave of absence from work.

At NUST, students undertake a crash programme of teaching during a prescribed block session, normally 4–6 weeks (Mpofu and Muller 2011). The objective is to accommodate all the teaching that would otherwise be done in one semester into one or two blocks. This enables students to blend what they learn with what they do at work. Altogether, there are eight such programmes currently running at NUST (Mpofu et al. 2008).

Block release programmes are consistent with the learning needs of older adults in that they are tailor-made for particular professionals who need to apply immediately what they are learning from the programme. They are targeted at particular deficiencies in professional practices. Plugging those deficiencies immediately

translates into improved professional practice which purportedly brings about more productivity.

- (iii) Limited access to computer technology (Mpofu and Muller 2011) and technophobia militate against a wholesale indulgence in *e-learning* at NUST. To date, only postgraduate block release programmes such as the Executive Master of Business Administration (EMBA) have benefitted most from e-learning (Mpofu and Muller 2011). The EMBA is more conducive to older adult learning in that it favours older people with many years of managerial experience. Also, access to computer technology remains a privilege of the few. For this reason, e-learning has, to date, been limited to those older adults who are corporate executives. The typical older adult faces two obstacles (no access and a phobia) and, as such, is several generations away from e-learning.

The non-formalization of academic programmes has commendably bridged the gap between University education and the world of work. Students can detect immediately the connection (or lack of it) between what is taught in class and their work situations. And, this constant interface between practice and University education will ultimately facilitate the development of a proper symbiotic relationship between them.

43.3 What Does Older Adult Learning Look Like Today?

Given that there is no recognized entity of older adult education in Zimbabwe, one has to consider adult education as a whole and distinguish what qualifies to be older adult learning. A recent study revealed five types of adult learning provision, namely, governmental; parastatal; non-governmental; commercial, industrial and mining; and private institutional (Mpofu 2010).

- (i) *Governmental provision*. This comes in two forms:
 - (a) Government departments have educational components particularly in agriculture, education, health, labour, home affairs, and youth and employment creation. Older adult learning is more visible in agriculture. Traditionally, agriculture is dominated by the old and infirm. And, the 'agrarian revolution' that turned every older person into a farmer has created a huge knowledge gap among these later-day farmers. To mitigate this knowledge gap the Department of Agricultural Extension has laid out educational programmes for farmers. Accordingly, each ward has two agricultural extension officers who conduct regular training for traditional communal farmers and the newly resettled communal farmers. Due to proximity, newly resettled commercial farmers seek technical assistance from the district agricultural extension officers. And those who can afford seek specialised technical assistance from private veterinary services. Government technical assistance is often accompanied by subsidies in the

form of farming implements, seeds and fertiliser. This has created an artificial demand for technical assistance in that virtually every ‘farmer’ flocks to these training sessions not necessarily for the knowledge provided but for the subsidies that come with it.

- (b) Governmental provision. This is also exemplified by those departments that run adult learning organisations such as Education and Youth and Employment Creation. The Division of Adult and Non-formal Education (DANFE) offers, among others, adult basic education (ABE) programmes nationwide. The ABE programmes are dominated by older women for two reasons. First, older women are not ashamed of their illiteracy status and are more willing to acknowledge it. Secondly, they are more susceptible to the material incentives that normally come with participation in these programmes (Mpfu 1997).

Typically, the Department of Youth and Employment Creation is not consistent with older adult learning. Vocational/industrial training centres such as Msasa in Harare and Westgate in Bulawayo are good examples of this form of provision. The programmes they offer are targeted at youth for the initial labour market and employment creation.

- (ii) *Parastatal provision*: This also comes in two forms: namely, instrumental provision (for employees) to enhance service delivery; and, mainstream provision to the general public. Notable examples of the former include national corporations such as the National Railways of Zimbabwe (NRZ) and utility authorities such as the Rural Electrification Authority (REA) that regularly train their staff members to keep them abreast of technological advances in their fields. The latter is exemplified by the School of Hospitality and Tourism and the Zimbabwe School of Mines, both in Bulawayo.

While instrumental parastatal provision cuts across all adult years, a significant third of the participants are older adults (Mpfu 2010). This is largely because the workforce is increasingly becoming older due to the exodus of the young. There is in-service training for young and new recruits and refresher courses for senior and largely older employees. The National University of Science and Technology has, on numerous occasions, been asked, through the Centre for Continuing Education (CCE), to partner several parastatal organisations in their endeavours to train and upgrade their personnel (NUST 2012). Two refresher courses for older adults that have become permanent events in the calendar year are the NRZ *Principles of Operations Management* course and the REA *Leadership and Supervision* workshop (NUST 2009–2013). The former consists of a two part, 4 week block release programme for middle managers while the latter is a two part bi-annual workshop for supervisory personnel. Due to the age of some of the participants, it is not uncommon for the instructors to use both English and vernacular to accommodate senior managers who joined the corporations at a time when the English language was a preserve of the few.

Mainstream parastatal provision is largely pre-service training for school leavers and the youth and as such has very little to do with older adult learning.

- (iii) *Non-governmental provision.* This comes in three tiers. The first tier consists of international agencies such as UNESCO, UNICEF, and DVV International that give technical support to the other two. Local and nationwide agencies constitute the second tier that normally operates at the community level. Examples include the HIV/AIDS Network and the Adult Literacy Organisation of Zimbabwe. A significant proportion of older adult learning takes place at this tier because most programmes on offer are largely tailor-made for specific groups rather than the general public. For example, the HIV/AIDS Network has different educational packages for different age groups. Also, there are many programmes at this level that are dominated by older adults. For example, as has been pointed out, Adult Basic Education (ABE) programmes are largely attended by older women.

The third tier consists of cooperative societies most of which are concerned with farming activities. As pointed out earlier, the ‘agrarian revolution’ has created a huge knowledge gap among the later-day farmers, most of whom are older persons with very little farming experience. As part of efforts to mitigate this knowledge gap, many have joined the major farmers’ cooperatives, namely, the Zimbabwe Farmers’ Union, the Zimbabwe Commercial Farmers’ Union and the Zimbabwe Association of Dairy Farmers. In addition, most have established local farming cooperatives to support local farming initiatives. The Department of Agriculture indirectly facilitates the establishment of local cooperatives by designating that it will only deal with cooperatives/associations (and not with individual farmers) for the distribution of farming subsidies. Notable examples include the Woodlands Plot-holders Association and the Umguza Tobacco Farmers’ Association. The latter has been chosen for the case study that is featured in this article.

- (iv) *Commercial, industrial and mining provision.* This is largely meant for employees. Again, there is a large contingent of older adult learning here because it is the elders who remained behind when the able bodied fled the harsh economic conditions. Notable courses in this regard include the *Management Development Programme* at Kadoma Paper Mills for 12 middle managers and its sequel, the *Supervisory Management Development Course*. Also worth noting are the occasional *Productivity and Project Management* related courses for mining companies such as Hwange, United Cement and Sino-Zimbabwe (NUST 2009–2013). Again, the CCE at NUST has, on many occasions, partnered these organizations in their quest to train their employees.
- (v) *Private institutions.* Older adults are conspicuous by their absence at private institutions. Private colleges such as the Academy of Learning and the Central Africa Correspondence College largely attract school leavers and ‘second chancers’ who missed out on earlier formal schooling. Accordingly, they are largely dominated by the 20–30 age group (Mpfu 2010).

43.4 Key Concepts and Theoretical Perspectives

The study of adult education in Zimbabwe has, as has been the case elsewhere, 'graduated' from *adult education* to *adult learning*. As a concept, adult learning is broader than adult education. It is lifelong in character and refers to all learning activities undertaken by adults throughout life (Indabawa and Mpfu 2005). It includes informal and non-formal learning through which adults acquire attitudes, values, skills and knowledge, through non-formally organised education, day-to-day experiences, as well as through interaction with family, neighbours, colleagues at work, or through the mass media.

Clearly, the *raison d'être* for adult education and consequently, older adult learning opportunities, is to address the older adult learners' educational needs outside the constraining and often discriminatory formal education system. In this regard, older adult learning denotes virtually all activities in which capacities and capabilities of people who are considered to be older adults are being developed for specific purposes, irrespective of the particular setting of the activity. It includes community education and continuing education aimed at facilitating modernization and development in general. It subsumes learning activities in commercial, industrial, mining, governmental, non-governmental, and private institutions, even though such activities may be termed human resources development or something else that obscures their educational dimensions.

43.5 The Influence of Government Policy on Older Adult Learning

Although there are policy statements that guide the provision of adult education in the country, there is a huge policy gap in adult learning (Mpfu 2010). The absence of a clearly defined policy on adult learning/education means that there are no proper guidelines on coverage and planning parameters. A clearly defined policy would highlight the variety of adult learning activities and thus foster coordination and collaboration among the many players in the field and also draw the public's attention to adult learning opportunities. In addition, a properly constituted policy would offer guidance on cost effective delivery modes.

Compounding the absence of a clearly defined policy is the misconception that adult learning consists only of adult literacy. Efforts by universities to place adult education students on internship in government departments are often met with scorn. Several reasons have been given for this decision. The most common is that the institutions (in which internship is sought) do not perceive themselves to be engaged in adult education. The other major reason that has been given is that the training that takes place at these institutions 'is not adult education, because that is the prerogative of DANFE'. Another reason that has been put forward is that

although the institutions promote community development programmes, there is no teaching per se.

The perception of adult education remains very narrow, particularly among the laypersons. Adult education is simply viewed as literacy and remedial education. There is a historical explanation for this misconception. At independence, the illiteracy rate stood at 63 % (Ministry of Education, Sport and Culture 2008). To mitigate illiteracy, the Government launched the Literacy Campaign/Programme in 1983. The Literacy Programme became synonymous with adult learning, and DANFE, its custodian, became the epitome of adult learning. The adult learning activities of the other government departments and that of other providers of non-formal education, have done very little to dent that perception. To many, the synonymy between DANFE and adult learning has remained etched in their minds.

Compounding the problem of the narrow perception of adult education is that DANFE is under-resourced. The Education Vote hovers around 16 % of the national budget and DANFE gets less than 1 % of that (Mpofu 2010). With such meagre resources, DANFE, the ‘custodian of adult learning’, cannot really amount to anything. Hence, to date there really has not been concerted nationwide multi-sector efforts to promote (older) adult learning. Instead, there are isolated, piecemeal and ad hoc efforts targeted at particular sectors with very little long term impact.

A national policy on adult learning would highlight the variety of adult learning activities and this would draw the people’s attention to available adult learning opportunities, and thus broaden their perception of adult learning. This could also serve to attract adequate resources for the field and also ensure that they are appropriately allotted to the most worthy adult learning causes.

43.6 Who Benefits Most from the Existing System?

Normally, adult learning takes place in mining, commerce, industry and agriculture. The formal mining sector has lost its vibrancy due to indigenisation policies that have not only discouraged investment but have also encouraged disinvestment. It is currently dominated by illegal gold panning which is populated by the young and able bodied because it is labour intensive. Meanwhile, commerce and industry have virtually collapsed due to both lack of investment and disinvestment. Bulawayo, the one-time industrial hub, lost more than 100 factories in the last decade (Chronicle, 13 September 2013).

Whereas agriculture has benefitted the most from educational opportunities, some groups within the sector have benefitted more than others. Government agricultural extension programmes are different for each sub-sector. For example, commercial farmers have reaped the most benefits from the system while communal farmers have received the least. As indicated earlier, the training has often been accompanied by subsidies. For the 2013/14 farming season, the Government contributed USD161 million while the private sector pitched in with USD720 million for the agricultural inputs support scheme (Chronicle 1 November 2013). Again, the

support provided is not the same for all ‘farmers’. Commercial farmers get tractors while communal farmers are given ox-drawn ploughs. Similarly, whereas communal farmers get a few packets of seeds and fertilizer, commercial farmers get truck loads.

43.7 Key Issues and Problems Facing Educators in Sustaining Older Adult Education

Legitimacy constitutes the biggest challenge facing educators in their endeavours to sustain older adult education. As a field, adult education (let alone older adult education) lacks instant recognition in several ways. First, adult education is a negative descriptor in Zimbabwe in that it is very difficult to explain what it entails without explaining what it is not. Implied here is that it is difficult to articulate and accredit adult education which in turn has serious implications for the professionalization of the field. People are generally reluctant to embark on a professional journey that lacks instant recognition. Also, it is difficult to legislate for a field that is not properly articulated and on which there is no consensus on what it entails. The tendency has been to legislate for aspects of adult education that have been properly articulated such as literacy – hence, the existence of clear policy statements on adult literary education in Zimbabwe (Ministry of Education, Sport and Culture 2008).

The legitimacy issue of adult educators perpetuates itself in many ways. People who work in adult education hardly see themselves as adult educators and their communities hardly see them as such. Instead they see themselves (and are seen by others) as specialists in their areas of specialization (training managers, community development officers, agricultural extension officers, home economists, course tutors and so on). Their areas of specialization have instant recognition, while their field of operation (adult education) barely carries any status in society. Consequently, they regularly seek to upgrade themselves in their areas of speciality so that they can meet the learning needs of their clientele who are also seeking to upgrade themselves in their respective areas of speciality.

43.8 What Does the Future Look like for Older People’s Learning?

The perceptual and legitimacy issues of adult learning will undoubtedly continue. However, there have been concerted efforts to mitigate the negative effects emanating from them. Several consultative conferences have sought to put adult learning into its proper perspective (Mpofu 2010). If current trends in consultative conferences persist the next decade should bring about the proper articulation of adult education which should facilitate the development of decisive policies on (older)

adult learning. A clearly articulated field will enhance the social recognition of those working in it which should create a desire for many to be associated with it, resulting in their willingness to be professionally trained. In addition, the consultative conferences should see the removal of the invidious hierarchy between formal and non-formal education. Consequently, this should legitimate the many educational activities that occur outside formal education as integral components of the education system, paving the way for greater cooperation between the formal education sector on one hand and the informal and the non-formal sectors on the other.

43.9 A Brief Case Study of a “Successful” Initiative in Older Adults’ Learning

A notable case of older adult learning is the Umguza Tobacco Farmers’ Association, which has become a regular feature of the Farming Supplement of *the Sunday News*, a Bulawayo weekly newspaper. The latest feature appeared in the edition of 26 January–1 February 2014. The 10 older tobacco farmers who constitute the association are pioneers of tobacco farming in the arid Matabeleland region of the country. Until recently, tobacco farming has been a preserve of farmers in the three Mashonaland regions, namely, Mashonaland Central, Mashonaland East and Mashonaland West.

Most members of the association are new to tobacco farming. This has necessitated numerous workshops for them under the auspices of the regional offices of the Tobacco Industry and Marketing Board (TIMB). The workshops are focused on the essentials of managing the crop. This also entails exposing the farmers to hands on experience on how to build proper barns using locally available and cheaper materials such as plastics. In addition to the TIMB extension officers, the workshops feature officials from the Environment Management Agency and the Forestry Commission who preach against the use of firewood for curing tobacco as this would cause deforestation. Instead, they encourage farmers to use coal for curing their tobacco, pointing out the proximity of Hwange Colliery (less than 300 km away) and the affordability of coal (at 65 US dollars a ton).

The workshops also feature many ways of harvesting water. At 84 mm per annum, the current average rainfall in Matabeleland is a far cry from the 500 mm per annum that is conducive for tobacco farming. It is therefore important that tobacco farmers learn how to harvest water via the construction of small dams and the drilling of boreholes. For the latter, the District Development Fund does not only till boreholes in Umguza, it also teaches farmers to drill their own. It is envisaged that at some point, the association will be assisted with the purchase of drilling equipment.

References

- Central Statistical Office. (2002). *Zimbabwe census report*. Harare: Government Printer.
- Chronicle, Bulawayo, Zimbabwe, Friday 1 November, 2013, p. 1.
- Chronicle, Bulawayo, Zimbabwe, Friday 13 September, 2013, p. 1.
- Chronicle, Bulawayo, Zimbabwe, Monday 2 September, 2013, p. 1.
- Education International News. (2008). *Zimbabwe: Education Fails amid Examination Debate*. <http://www.ei-ie.org/en/news/show.php?id=9108theme=hivaid&country=zimbabwe>. Accessed on 17 Feb 2010.
- Hill, G. (2003). *The battle for Zimbabwe: The final countdown*. Cape Town: Struik Publishers.
- Indabawa, S., & Mpfu, S. (2005). *The social context of adult learning in Africa*. Cape Town: Pearson Education.
- Ministry of Education, Sport & Culture, Zimbabwe. (2008). *Report on The Development and State of the Art of Adult Learning and Education in Zimbabwe, 1997–2007*. http://www.unesco.org/fileadmin/MULTIMEDIA/INSTITUTES/UIL/confintea/pdf/National_Reports/Africa/Africa/Zimbabwe.pdf. Accessed on 30 Jan 2014.
- Mpfu, S. T. (1997). The Fallacies of literacy campaigns: Reflections on the Zimbabwe National Literacy Campaign. *Zimbabwe Journal of Educational Research*, 9(1), 18–43.
- Mpfu, S. (2005). Issues in the training of adult educators: An African perspective. In F. Youngman & M. Singh (Eds.), *Strengthening the training of adult educators: Learning from the inter-regional exchange of experience* (pp. 45–53). Hamburg: UNESCO Institute for Education.
- Mpfu, S. (2008). Changes in the learning and teaching culture: Contextualization of learning in Zimbabwe. In M. Singh, D. Johnson, & I. Bajunid (Eds.), *Conference proceedings of the South-South Policy Forum on Lifelong learning as the Key to Education for Sustainable Development (ESD)*, Jakarta, Indonesia, 21–23 April 2008.
- Mpfu, S. (2010). *A survey of adult education provision in Zimbabwe*. Commissioned by and submitted to DVV international, Regional Office, Southern Africa, Cape Town, South Africa.
- Mpfu, S., & Muller, C. (2011). From Réchauffé to Recherche – Online Education in Zimbabwe. *Adult Education and Development*, 76, 59–72.
- Mpfu, S., & Youngman, F. (2001). The dominant tradition in adult literacy – A comparative study of national literacy programmes in Botswana and Zimbabwe. *International Review of Education*, 47(6), 573–595.
- Mpfu, S., Phuthi, N., & Sibanda, I. S. (2008) Massification of Higher Education at the National University of Science and Technology: An Institutional Report for the occasional publication of the ADEA Working Group on Higher Education (WGHE). *The Effects of Massification on Higher Education in Africa*. Compiled by G. Mohamedbhai for the Association of Africa Universities, Accra.
- National University of Science and Technology. (2009–2013). *Annual reports for the centre for continuing education*. Bulawayo: NUST Department of Information and Public Relations.
- National University of Science and Technology. (2012). *Centre for continuing education: Course brochure*. Bulawayo: NUST Department of Information and Public Relations.
- Nyerere, J. (2006). Adult education and development. *Adult Education and Development*, 67, 77–88.
- Sunday News, Bulawayo, Zimbabwe, Farming Supplement, 26 January – 1 February, 2014, p. B7.
- WHO. (2001). *Definition of an older or elderly person: Proposed working definition of an older person in Africa for the MDS Project*. <http://www.who.int/healthinfo/survey/ageingdefnolder/en/>. Accessed on 22 May 2014.

Chapter 44

Concluding Remarks

Brian Findsen and Marvin Formosa

This chapter provides a chance to reflect on the significance of the 42 country/regional descriptions and analyses of later life learning/education. It is deliberately entitled “Concluding remarks”, as opposed to “Conclusions”, to indicate that this is essentially an exercise using a problematizing approach (Freire 1984). This is a place for observation and critique of patterns related to later life learning. It is not a place, as post-modernists remind us, to espouse “grand narratives” on the state of older adult education globally but to examine some of the key dynamics at play in interrogating its character.

Arguably, there are many ways to shape a review of the significance of the 42 country/regional reports that precede this chapter. In the introductory chapter, we indicated that we recommended to authors that they select from a framework of questions to analyse the nature of older adult learning/education for their geographical context. In this chapter, we use this framework to discuss emergent patterns/themes from these international descriptions and critique. While discussion under each heading relates as closely as possible to the title, the categories are porous and not mutually exclusive. Subsequently, we address how research, policy and practice have significance in learning in later life.

B. Findsen (✉)

Te Whiringa School of Educational Leadership & Policy, Faculty of Education,
University of Waikato, Hamilton, New Zealand
e-mail: bfindsen@waikato.ac.nz

M. Formosa

Department of Gerontology, Faculty for Social Wellbeing, University of Malta,
Msida, MSD 2080, Malta
e-mail: marvin.formosa@um.edu.mt

44.1 Historical Formations

Each country has its unique patterns of historical events but in many instances patterns emerge which go well beyond country borders as globalisation has gained precedence in economic, political, socio-cultural realms (Hake et al. 2004). In the continent of Africa particularly, while the effects of imperialism have had some similar detrimental impacts across countries on indigenous knowledge, the resultant formations differ significantly. For instance, the advent of Christian missionaries and their consequent ideological and practical influence in locations such as Kenya and Tanzania, have meant that older people have responded differentially. The ascendancy of Western views of the world has meant that in most of the African continent, local knowledge(s) have been largely subjugated but remnants survive. In a broader context, exemplified by the case of New Zealand, indigenous knowledge has re-emerged as a significant driver of public policy, in this case aligned to the Treaty of Waitangi signed in 1840 between the British Crown and local iwi (tribes) (Smith 1999). Māori knowledge is now enshrined in educational structures from early childhood to tertiary education wherein Māori people have an alternative structure for more formalised learning from cradle to grave (lifelong learning).

In the Asian context, Confucianism has had a similar sway to Christianity in terms of values and norms adopted by citizens of countries such as China, Hong Kong, Taiwan but also present in other neighbouring countries such as Malaysia. Religion and/or spirituality in Malaysia and Indonesia, especially connected to Islam, have historically heavily influenced the provision of educational opportunities for older citizens. In both cases, mosques form an integral component of non-formal education and the state supports this agenda. In more secular societies, for instance, the USA and Australia, religion may still have some influence on older adult participation (particularly in “the bible belt” of the South in the USA) but there is less overt relationship of the state with religion.

In most of the Asian countries included in this book, respect for elders has been maintained both in civil society but also through governmental policy. The concept of filial piety still matters but according to the experiences of Hong Kong and Taiwan, modernisation and urbanisation have disrupted this cultural dynamic. There is active contestation here, as in other countries reported in this volume, among providers of organised learning linked to the state, the private sector and civil society (especially the family) concerning whose responsibility it is to arrange educational opportunities for seniors. Historically, governments have been slow to acknowledge any substantive support for senior education though there is considerable variation. For example, the United States of America has had longstanding support from federal and state level government; this contrasts with the situation in Colombia where the dominant pattern of neglect of older people is the norm. Indeed, the relative high degree of social exclusion of older persons in the South American continent led to the older adult education movement emerging from the action of Non-Governmental Organisations (NGOs) whose rationale is to increase the quality of life of older persons through empowerment programmes. However, in recent

decades, even the North American movement in older adult education became characterised by a liberal and individualistic temperament. Initiatives promoting older adult education in Shepherd's Centres, OASIS, Seniornet, Senior Centres, Elder Hostels and Senior Theatres were all the result of personal and community-led enterprises. The market has also emerged as key driver in the USA, as more companies seek to tap into the silver industry market, something that will certainly become more the case as other countries register an increase of their quota of baby boomers. A similar situation is found in Canada where one finds many excellent examples of groups or organisations that provide high-quality learning opportunities for older adults, and which developed from micro-level initiatives. Aligned to nationalist movements, some countries (China stands out as a classic case) have suffered dramatic changes in ideology (e.g. the Cultural Revolution, 1966–1976) which have further impacted (usually negatively) on the confidence of elders to voice their learning needs and aspirations. The apartheid movement, discussed in the renditions from South Africa and Namibia, maintained an oppressive regime of blatant social control over blacks and minorities, so that education was denied not only to older people but to those normally considered part of the labour force (normally 18–65). In Zimbabwe, a long period of suppression of (descendants of) former colonisers, has chased out many members of the workforce, leaving behind older people with very basic skills to cope with a new era.

Although older persons in all European countries are under-represented in formal institutional learning, the historical emergence of older adult education in this continent defies any simple characterisation. For instance, whilst in Austria one can trace early developments to professional association with an interest in education, in other countries such as France and Malta older adult education emerged as a specific branch of traditional universities. Elsewhere, such as in Germany and the Nordic countries, interest largely emanated from third sector organisations interested in improving the employability of older workers, whilst in Southern European countries such as Italy, Portugal, Spain, Greece and Cyprus initiatives only emerged following an awareness of the long 'wasteful' retirement span of retirees in such regions. An interesting point here is that whilst most countries experienced improvements in the development of older adult education, the opposite cannot be ruled out. For instance, after an excellent tradition of senior education in the Netherlands, especially in the 1980s, nowadays many of these past innovations have been completely lost, whilst others are silently embedded in institutional and organisational provisions. Although there is currently a more positive image on ageing, the innovations have not resulted into a more active governmental policy on senior education. New crucial developments are information and communication technology, inter-generational issues, retaining older workers and attention for older migrants. This demonstrates that one cannot assume or take for-granted that countries with past good practices in older adult education will continue to strengthen or build on them. However, the opposite may also be the case, as countries such as Slovenia and Malta have included recommendations for older adult education in all their public policies.

44.2 Significant Organizations and Individuals

In many of the country descriptions, a plethora of organizations have been identified. Diversity of provision, especially in the richer countries, is the norm. The actual structure of provision is linked to historical patterns (see above) but can be divided into more generalised adult education open to all adults and specialist age-segregated forms. Participation patterns evident in adult education more generally, tend to be repeated in older adulthood. In the analysis of Malta, the U3A is critiqued for its elitist intake according to social class, gender and third ageism. The U3A movement internationally is very strong (particularly in Commonwealth countries such as Australia and New Zealand; in China, Taiwan and Malaysia too) but the critique is fairly applicable across different Westernised countries, regardless of location. The North American equivalent (Lifelong Learning Institutes) also exhibit the characteristics of middle-class capture and gender differentiation (older women predominate; the curriculum is largely “feminine”) yet also demonstrate how self-directed older adults can self-organise to collectively achieve their educational aims. U3As epitomise the self-help philosophy in action.

In the developing countries in this volume, the influence of NGOs is potentially very strong, dependent to some degree on the relationship with the state. In some instances, NGOs operate in place of the state or otherwise in partnership. In the case of Lesotho, a very small country in Southern Africa, the religious and community-based NGOs provide a backbone to provision for older people. In Hong Kong, a triangle of provision operates among NGOs, the government and business. Added to this picture, the international NGOs and aid providers, as in the situation of Nigeria, may enhance the prospects of older people’s learning but also get in the way of local people providing local solutions. In Tanzania, the unexpected help from Sweden has seen the proliferation of Folk Development Colleges (derivative of “the Nordic model”) transplanted into a very different historical/cultural context. Hence, international aid can have complex and sometimes contradictory consequences.

The role of universities in older adult education is a major topic explored in many countries. At one extreme is the case of Colombia where older adults are ignored and neglected by universities, reflective of wider societal malaise. In more developed countries (e.g. Germany, the USA, Canada), the relationship between universities, in terms of community engagement, has been pivotal to the enhancement of older adult education, particularly for the well-heeled. In some African countries described in this book, adult and continuing education has played a significant role in provision, in research (though this is hardly plentiful) and community development. The case of the University of Science and Technology (NUST) in Zimbabwe (see Chap. 43) is especially salient in this regard in its provision of parallel classes, block courses and e-learning. While NUST has had a more vocational/technical emphasis in provision, the University of Zimbabwe has tended to provide more liberal adult/continuing education. This kind of complementarity across tertiary providers (instrumental versus liberal education) is echoed in many other countries.

The community college sector, emergent in several Asian countries (derivative of the “American model”), provides less formalised and lower qualification programmes to adults, inclusive of elders.

In terms of individuals influencing the direction of older adult learning/education, each country has its own “heroes”. In the UK, pioneers such as Frank Glendenning have improved the visibility of educational gerontology, enhancing it as a serious area of study. The influence of at least two people stands out: Julius Nyerere in Tanzania who argued for a different approach to adult learning in which collaboration and empowerment became crucial to the development of nationhood; Grundtvig in Denmark (and adjacent Nordic countries) where enlightenment, creativity and humanism have been hallmarks of Scandinavian countries’ adult education system. The Nordic “story” in this volume (see Chap. 28) is one of considerable success based on egalitarian principles that is the envy of many adult educators across the world.

44.3 What Does Older Adult Learning/Education Look Like?

As in Chap. 1, the distinction between “learning” and “education” comes to the fore. In the previous section of this chapter, the diversity of organizations was emphasised related to governmental, private or voluntary initiatives. The complexities of any one country’s provision in education are evident; the 42 chapters illustrate that many factors influence the ultimate pattern: societal history; colonization; geography; climate; ethnic composition; level of literacy; social movements and so on. It is simply not possible to generalise across countries to encompass all forms of older adult learning/education.

One factor which is not mentioned universally in the country chapters is that of workplace learning/education. In the “developed countries” where the numbers of older adults are continuing to stay in paid work beyond what used to be compulsory retirement, the issue of who gets what form of training or professional development is a hot topic. In Germany, vocational training for older workers is taken very seriously; elders undertaking “second” and “third” careers, especially in Western countries, are the targets for extra training in some environments such as the Nordic countries; in the UK, the establishment of the Third Age and Employment Network (TAEN) is illustrative of the need for countries to reconceptualise and implement new pathways for mature-aged adults to (re) enter the workforce with commensurate expertise. Yet what is significant from the 42 chapters is the relative absence of discussion on workplace learning/education.

Another important theme to emerge in terms of older adult learning is the place of indigenous knowledge(s). As pointed out in Chap. 27, Nigeria has upheld the value of traditional education in which the entire community finds an appropriate preparation for life and where older persons have been treasured in dealing with

social and political issues. In New Zealand, the distinction is made between indigenous and derivative forms of knowledge (Dakin 1992); the former relates to Māori knowledge construction and emergent educational structures associated with *tino rangatirota* (self-determination); the latter to European style learning/education linked to institutions of the coloniser. In several developing countries this tension between derivative and traditional/indigenous learning is unresolved but Western frameworks are shaping to dwarf local indigenous exemplars.

Inter-generational learning is another area wherein there is increased consciousness of its importance as part of a fuller range of opportunities for (older) adults (Schmidt-Hertha et al. 2014). Learning across generations is nothing new (see the lifelong learning ethos of many indigenous peoples) but inter-generational education has gained traction in many sectors of the globe. When grandparents and grandchildren are involved in collaborative enquiry or carry out learning together, then one form of inter-generational learning is occurring linked to the informal context. In Taiwan, for instance, there has been considerable governmental investment in this area, including in universities where more citizens are being trained in effective strategies (see Chap. 37). However, the trend revealed in these country accounts is that little public money is currently being prioritised for this kind of education.

In some countries, however, older adult education is truly a melting-pot of activity. Clear cases in point include the Russian Federation where presently older adult education is located within various institutions ranging from scientific institutions to adult education institutions to state institutions to adult education centres. In Turkey older adult education programmes aim to improve literacy skills as well as to address various socio-economic disadvantages; and the United Kingdom boasts the highest rate of older persons in tertiary education but also provides wide-ranging initiatives in third and fourth age learning. Another interesting facet of older adult education includes the University Programmes for Older Persons present in Spain and Portugal where traditional universities include learning centres that coordinate diploma programmes for solely persons aged 50-plus.

In South America, older adult education's priority is to have a positive impact on the quality of lives of participants and older persons in general. For instance, Brazil includes over 200 Universities of the Third Age whose goal is to promote learning as an end in itself, whilst late-life learning in Argentina contributes to a better understanding of the social construction of active ageing. This has been achieved by enabling better recognition of human rights, and the need to become socially integrated through education as a means of social transformation. In Chile, older adult education has made knowledge more democratic, making it possible for older adults to acquire useful tools to positively address the changes inherent to the ageing process from biomedical, psychological, functional, and social perspectives. At the same time, it has also helped promote the right to equal opportunities in social participation in comparison to other age groups. Chapter 8 gives an overview of senior adult education in Chile, shedding some light on the challenges emerging in this field.

44.4 Key Concepts and Theoretical Perspectives

Unsurprisingly, the diversity of concepts and theoretical positioning of the authors in this volume is immense. These differences relate to contested “central” concepts such as lifelong learning, “active ageing”, the learning economy, ageing societies, social exclusion and self-directed learning (SDL) but also to a fuller range of kindred ideas, including empowerment (both of individuals and groups in varied societies), retirement, multi-culturalism, second/third careers, learning in place and filial piety (especially in Asian countries).

Almost without exception, the authors mention the changing population structure for ageing as a major driver in respective countries for growing awareness of an ageing society and what a learning society might look like where older people have equivalent status to younger generations. What is quite remarkable are the in-country differences within sub-groups of national populations. As in the case of Canada (see Chap. 7), the disparities across the provinces are large and, as a consequence, policy responses are similarly at variance. These differences can have major impact on the quality of life of citizens. Again, in the Canadian scene, the broadband availability of citizens in Toronto contrasts with access for people about an hour away. The urban/rural divide, alluded to here, is a major impediment to social inclusion, particularly evident in reports from developing countries of Latin America and Africa.

Embedded in most analyses from the authors are the latent themes of lifelong learning – the economic imperative of countries to compete in a global marketplace; the seeking of self-fulfilment through learning opportunities in later life; the need for an educated citizenry throughout the life course; the acknowledgment of diversity within older age groups (heterogeneity) and the need to address social inequalities (Findsen and Formosa 2011). In many countries, there is a realisation that age-friendly environments (e.g. businesses; supermarkets) help older people in terms of mobility and social connectedness but also are favourable for other generations in society. The overt philosophical tension between on the one hand to enhance a country’s economic well-being (in which older people are commonly marginalised) and on the other to put in place policies and practices to promote seniors’ participation, is recognised across national boundaries. In the case of the European Union, while countries are financially interdependent, they all face the spectrum of alienation of older citizens from contributing to nationhood. A possible answer lies in “the Nordic model” (see Chap. 28) where collaboration and social dialogue are emphasised yet even in these nations where adult education is arguably the strongest across the globe, there is the need to be eternally vigilant of the consequences of social policy choices on the least privileged of older citizens.

44.5 The Role of the State

The role of the state in older adult education is at the very best minimal. This role is inter-connected with the respective roles of the marketplace (private providers) and civil society (exemplified by older adults' voluntarism in organisations and how the family is positioned). We need to always consider the wider parameters of educational opportunity in individual countries, usually in relation to the context of adult education and lifelong learning. Some countries have long traditions of state engagement in adult education – from large countries such as the USA where the provision of educational opportunity for the general public is bewildering to tiny countries such as Malta where provision is much more modest but equally important to citizens. Further, we know that globalisation has affected nations differentially, sometimes related to how governments manoeuvre themselves in relation to corporate culture. For many African countries, international intervention (in terms of direct financial aid and/or partnerships on projects) has had both positive and negative implications for the local populace.

In the commentaries from Asian authors in this book we gain a nuanced understanding of how governments have negotiated their pathways of social policy in terms of seniors' welfare. It is evident that social protectionism is to the fore, exemplified in the situation of countries such as Singapore, Taiwan, the Republic of Korea and Hong Kong. The general approach in such countries has been to connect educational opportunity/provision with other social policy initiatives in a blended approach. For instance in the Republic of Korea, there were several interlinked policies announced by government in employment (1994), welfare (1997) and lifelong education (1999). In Indonesia, the National Commission for Older Persons, established in 2004, set up three leading tertiary education institutions to focus on the development of older adults' well-being in which education/training is embedded. In Singapore (see Chap. 33), the author points to government's role as a catalyst in older adult learning. In China there are 10 ministries whose work connects overtly with the quality of life for seniors but the challenge is to insist that they communicate effectively not only internally but also externally to the millions of Chinese citizens in later adulthood.

One key policy area connected to the promotion of "a learning economy" is retirement and/or pension schemes. In poor countries it is the rule rather than the exception that older people fend for themselves "post-work". There are encouraging exceptions, as in the case of Lesotho, where a non-contributory government pension scheme has been developed in a struggling economy, but more generally, the poorer the country, the greater the likelihood that citizens are left to their own devices. In practice, this often translates to older family members looking after younger or vice versa. The phenomenon, especially in Africa, of grandparents looking after grandchildren on a permanent basis, is serious, related to the impact of HIV/AIDs on younger Africans and/or the need for "middle generations" of men going abroad to seek employment.

The general picture of state assistance to older people's education is very poor. When state support is visible (often not the case) it is commonly connected to other social policy which does not necessarily strengthen older adult education.

44.6 Who Benefits from the Current Situation?

This sociological question has quite clear answers. The oppressed in societies (Freire 1984) are the least likely to participate in formal education and this trend may continue for them into non-formal provision, related to state policy (see above). In almost every chapter, there are compelling renditions of how members of marginalised groups have been disenfranchised from educational opportunities. The patterns of participation, displayed in younger life, tend to continue into later adulthood (Oduaran and Bhola 2006).

It is clear that colonisation has had major historical effects on who gets to define and access education in later life. Throughout Latin America and Africa, the “stories” of imperialism abound in individual accounts. The hegemony of colonisation/imperialism has had profound impact as illustrated in the case of Nigeria (see Chap. 27), where the slave trade saw large cohorts of locals transported to the countries of the coloniser; In South Africa and Namibia, apartheid upheld through white supremacists, meant that educational opportunity was only a dream for black Africans. The wars in Africa, as in Zimbabwe, have also impacted very negatively on who gets what forms of knowledge (see Chap. 43).

The patterns of colonial domination cannot be dismissed lightly. But other forms of domination continue, related to social structure, in all countries of the world. Related to gender inequality, ethnic oppression, rurality, worker exploitation and a host of other factors, each country/region has challenges in terms of issues related to social stratification. In the instance of Tanzania, marginalised older adult groups whose literacy levels are poor, have been directed to empowerment-based, learner-centred initiatives to try to address their predicament. The Regenerated Freirean Literacy Empowering Community Techniques (REFLECT) methodology was employed, as an example of a community-based adult education programme, to help overcome historical disenfranchisement. The resultant impact on their lives has been mixed (see Chap. 38). In the situation of Zimbabwe, the disparities between commercial and communal farmers, in terms of their relative access to effective technologies, are a painful reminder of how those with the most resources get the “best” forms of education/training (see Chap. 43).

44.7 Key Issues for Older Adult Learning/Education

As in the section where key concepts and theoretical orientations were discussed, a similar plethora of issues has emerged from the 42 chapters. Issues are of an ideological type (from definitions of “an older adult” to ideological positioning such as Confucianism), related to policy decision-making at multiple levels (e.g. the impact of international projects), to discrimination in terms of one’s place in the social structure (e.g. the treatment of older women) and to practical matters (e.g. the accreditation of learning).

An issue which permeates all chapters is that of adult literacy and the effects of illiteracy on older adult participation in learning/education. A definite pattern emerged that older cohorts in national populations invariably were the least literate members of that society. However, there was an awareness that subsequent cohorts of elders would be more literate and better educated, particularly evident in Western countries. To some extent, this belief in greater literacy among older people, is reflective of the expected impact of actual programmes currently in operation in countries such as Germany, Canada, the Nordic countries and the UK. Significantly for some parts of Africa, this is also the case, as exemplified by Tanzania (see Chap. 38). In India, where millions have historically not engaged in any form of formal learning, older minorities have been identified as a priority in policy and practice in terms of greater access to higher education (see Chap. 16).

Resource allocation to adult education in most countries has been a low priority (the Scandinavian countries appear to be an exception). Allocation of resources to older people in many countries lags behind the realities experienced by these citizens (Riley and Riley 1994). Unsurprisingly, then, older adult education receives pitifully little in terms of funding, if indeed it is officially recognised and not rendered invisible. Within many countries, as in China where the divide between urban and rural is very wide, there are severe disparities. As mentioned by some authors, lifelong learning/education does receive indirect support through other categories of social provision. Hence, an intelligent strategy has been adopted in some instances to strengthen the connections for older adults in other social spheres where funding is less contestable (e.g. health).

Amid the multitude of issues faced by countries in this book the inattention or neglect of people in their fourth age is stark (Laslett 1989). As mentioned with respect to Malta, people in their fourth age (largely dependent on others for care; more prevalent amid the old-old) are devoid of current priority from the government and it is usually the family who have to bridge this gap. In addition, this care falls disproportionately on older women, as typically the female population in late adulthood in any country is more numerous than the male and stereotypically women work more often in the domestic domain. In Japan and other neighbouring countries where ageing of society is on a fast track (the Republic of Korea is an example), the issue of how people in their fourth age receive care and educational opportunity will be watched carefully. It is relevant here to mention that the issue of suicide, mentioned in a few reports, is high in Japan (see Chap. 19), particularly in the 80+ age bracket. A contributing factor, it is believed, are the connected issues of loneliness and social isolation.

44.8 Successful Initiatives

There were a large number of innovations and “success stories” conveyed in the 42 chapters. While the criteria for “success” will vary, so too will the magnitude of the initiative. In some countries the innovation might be significant but not be considered noteworthy in another. However, the underlying notion of empowerment of

older people tends to be a common factor – previously silent groups taking the step to be heard by authorities (as in the Nigerian village episode, UNIVA); a pattern of provision common in other places being introduced into a new environment (as in the Malaysian U3A movement); a different ethnic group asserting its self-determination (as in the case of Māori elders of the Rauawaawa Trust in Hamilton, New Zealand); an innovative inter-generational programme as described in the Taiwanese context (the Madou Learning Resource Centre for Active Elderly, LRCAE); the men’s shed movement, especially in Australia, where unemployed and/or “retired” men commonly assemble for learning and sharing together (see Chap. 3).

One of the emergent themes from the country descriptions is the high association between adult literacy and older adult self-determination. Particularly in the African context, national or mass literacy programmes have benefitted the older generations, given their lack of opportunity earlier in their lives. One such example is the Kha Ri Gude Literacy campaign (“Let us learn”) initiated in South Africa in 2008 mainly for non-literates up to the age of 74. Supported by the South African Council for the Aged and many NGOs, this programme has had very impressive outcomes for a sub-population which have been left out of educational opportunity previously (see Chap. 35).

Other initiatives worthy of specific mention, again from the African sub-continent, include the Roma Valley Pensioners’ Project in Lesotho, the Sengerema Older learning District plan in Tanzania, the Umguza Tobacco Farmers’ Association in Zimbabwe. In the Asian context, the advent of the Barefoot College model in India where older women are trained as solar engineers and the retired Senior Volunteer Programme in Singapore are testimony to initiatives taken resulting in positive outcomes for older people.

44.9 Looking at the Future

Many of the issues discussed earlier in this chapter are also included in this future scenario development. Most country/regional accounts provide a balance between pessimism and optimism. In many instances, the identification of problems was quite similar – the literacy issue among elders which restricts their engagement in society; how digital innovation is impacting on existing seniors with ambivalent consequences; how unenlightened policy among employers and governments is having a discouraging effect on older workers’ seeking appropriate training and development; the failure of higher education in most countries to work with older adults in meeting their formal learning aspirations; the reluctance of governments to invest in older adulthood social and educational issues.

Counter-balancing the more negative projections are those of a much more optimistic orientation. Included in this more positive scenario are the following observations: the baby-boomers, whose behaviour is unlike any previous generation, will spark significant changes in most societies; older people will continue to volunteer in large numbers and thereby help keep a viable civil society active; there will be

greater cognisance taken of the learning needs of older workers as their numbers proportionately increase in workplaces; the fourth age will receive its proper share of resources as governments can no longer sustain patterns of neglect.

44.10 Research, Policy and Practice

44.10.1 Research

The sub-title for this book is “Research, policy and practice”. It is useful to provide explicit comment on each of these components in this book, given that most discussion of these domains has been implicit. Research in the field of learning in later life (educational gerontology) is emerging at a quickened rate from a very low baseline. There are some examples in this volume of specific small-scale empirical and/or action research, which tend to be hallmarks of this emergent interdisciplinary area. Under different headings (e.g. social gerontology; human resource management), there are worthwhile examples of research, much of which is not included here. The “elephant in the room” with respect to learning in later life is the relative failure in data collection by (governmental) agencies for people learning/working beyond the normal working age (18–65 in most countries). While this observation emanates principally from Australia/New Zealand, it is a global issue. There needs to be far greater pressure exerted on authorities to collect relevant data on older adult learning/education across the globe so we can continue to learn from one another.

44.10.2 Policy Development

In this book there have been discussions of policy developed at multiple levels – local; regional; national; global. Many countries rely on internationally high status (learning) institutions from which to glean appropriate guidance such as the UNESCO, the OECD and the International Labour Organisation (ILO). At a European (EU) level, there are several agencies which have provided benchmarks for international performance. There is an overall picture of neglect in most countries in terms of their development of lifelong learning and/or adult education policy, let alone older adult education. Most social policy currently related to this field is derivative of allied domains (e.g. health; finance; social welfare; labour). While adult educators may exploit other connected domains for resources to assist older people, there is a limit to this game. It is important, wherever policy is being developed, that the voices of older people themselves, especially those most disenfranchised, be heard in venues that matter. It is also imperative that an *educational* policy be developed, independent of other related social policy initiatives. In the country accounts, without exception, the gap between rhetoric and reality is almost

a chasm. The conceptualisation- implementation gap is one which we need to continually trumpet for correction in order to get effective outcomes for older adults.

44.10.3 Practice

There are many instances of “good practice” contained in the chapters, particularly associated with “successful initiatives”. Ideally, there should be a thread of consistency from research to policy to practice or more directly from research to practice. Much practice in older adult education, as for many sub-fields in the social sciences, is motivated by numerous factors including a person’s wanting to help older people, personal fulfilment, or from an altruistic stance (e.g. social justice). Few people engage for financial gain; few undertake professional development; most are volunteers. One of the emergent themes from these chapters (see Chap. 37 on Taiwan as an exemplar), is the need to professionalise the field further. However, there should be an active debate on the merits and limitations of such an approach (see Findsen 2009) before this orientation is adopted more universally. As mentioned in Chap. 1, the intent of this book has been to provide insight into how older adult learning/ education is conducted across many countries globally, influenced by policies and, to a lesser extent, research. A framework of questions was used as a benchmark for commentary by authors and as a consequence it has provided us with some useful comparisons and insights. Quite clearly, this book should function as a trigger for many more analyses of older adult learning both in countries included in this volume but also for others whose voices are yet to be heard.

References

- Dakin, J. (1992). Derivative and innovative forms of adult education in Aotearoa New Zealand. *New Zealand Journal of Adult Learning*, 20(2), 29–49.
- Findsen, B. (2009). The professionalization of adult educators: Issues and challenges. *Journal of Adult Learning Aotearoa New Zealand*, 37(1), 27–43.
- Findsen, B., & Formosa, M. (2011). *Lifelong learning in later life*. Rotterdam: Sense Publishers.
- Freire, P. (1984). *Pedagogy of the oppressed*. New York: Continuum.
- Hake, B., van Gent, B., & Katus, J. (Eds.). (2004). *Adult education and globalisation: Past and present*. Frankfurt am Main: Peter Lang.
- Laslett, P. (1989). *A fresh map of life*. Cambridge, MA: Harvard University Press.
- Oduaran, A., & Bholia, H. (Eds.). (2006). *Widening access to education as social justice*. Dordrecht: Springer.
- Riley, M., & Riley, M. (1994). Structural lag: Past and future. In M. W. Riley, R. L. Kahn, & A. Foner (Eds.), *Age and structural lag* (pp. 15–36). New York: Wiley.
- Schmidt-Hertha, B., Krasovec, S. J., & Formosa, M. (Eds.). (2014). *Learning across generations in Europe*. Rotterdam: Sense Publishers.
- Smith, L. H. (1999). *Decolonizing methodologies*. Dunedin: Zed Books.