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It also aims to address topics such as sustainability, educational processes, social and intercultural policies, ageing and new tourisms that will be studied in function of different disciplinary perspectives such as psychology, geography, political science and history.



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Active Ageing

From Wisdom to Lifelong Learning

Edited by
Guido Amoretti, Diana Spulber and Nicoletta Varani



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Acronyms

AAL	Active and Assisted Living Joint Programme
ADL	Activities of Daily Living
AFRAN	African Research on Ageing Network
AFU	Age-Friendly University
AONTAS	The (Irish) National Adult Learning Organisation
AU	African Union
AUSER	Associazione per l'invecchiamento attivo (Association for the Active Ageing)
CLL	Centre Lifelong Learning
DCU	Dublin City University
EASI	Employment and Social Innovation Programme
EHEA	European Higher Education Area
EIT	European Institute of Innovation and Technology
ESIF	European Structural and Investment Funds
FEDERUNI	Federazione italiana tra le Università della Terza Età (Italian Federation among University of the Third Age)
FIPEC	Federazione italiana per l'educazione continua (Italian Federation for Lifelong Learning)
IADL	Instrumental Activities of Daily Living
IBGE	Instituto Brasileiro de Geografia e Estatística (Institute of Geography and Statistics)
ICT	Information and Communication Technologies
IGLP	Intergenerational Learning Programme
ILO	International Labour Organisation
IMI	Innovative Medicines Initiative
ISTAT	Istituto nazionale di statistica (National Institute of Statistics)
JPND	Joint Programme Neurodegenerative Disease
MIPAA	Madrid International Plan of Action on Ageing
MYBL	More Years, Better Lives Joint Programme
NCDS	Non-communicable Diseases
OPAS	Organização Pan-Americana da Saúde (Pan-American Health Organisation)

ACRONYMS

SSA	Sub-Saharan Africa
UNECE	United Nations Economic Commission for Europe
UNIEDA	Unione italiana educazione degli adulti (Italian Union of Adult Education)
UNITE	Università della Terza Età (Third Age University of Genoa)
UNITRE	Università della Terza Età (University of the Third Age)
UTA or U3A	University of the Third Age

Foreword

Luigi Ferrannini

Old age is a long winter, which should be filled with life that never ends. You need care, but also an image that redeems old age fragility and loss.

Trabucchi (2016)

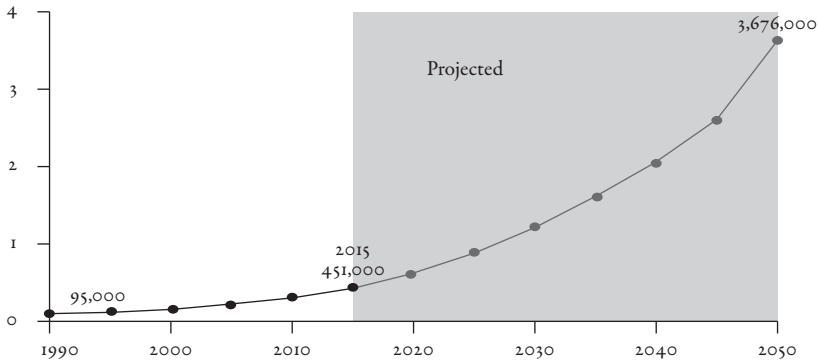
According to the definition of the World Health Organization, active ageing is «the process of optimizing opportunities for health, participation and security in order to enhance the quality of life as people age» (WHO, 2002). The ageing of the population represents both “a triumph and a challenge” for the society and combines two aspects of the problem: the improvement of the living conditions and the necessity of adapting the processes of care and assistance.

What kind of ageing are we talking about? what “old” means? In addition, new phenomena are changing and making the scenario more complex: the significant increase of the percentage of ultra-centenarians in the world (FIG. 1), especially in some countries (e.g. 4.8 in Japan and 4.1 in Italy every 10,000 people in 2015; FIG. 2), along with cultural and ethnic changes (for instance, the long-term effects of massive immigration) and the economic crisis (severely affecting the elderly) within our societies.

This scenario raises the need for a new vision of the “third age”, including relevant changes to frame the following challenges: cultural aspects, health aspects, psychosocial aspects, policies on education, on labour, on retirement, on health care and on other basic social services, on urban planning and accessibility, among others. In short, it is necessary to make a quality leap, building future policies, as well as policies shaping the future, avoiding these challenges become fragile and inappropriate justifications of the failures about the employment, the economy, and, consequently, about the political governance.

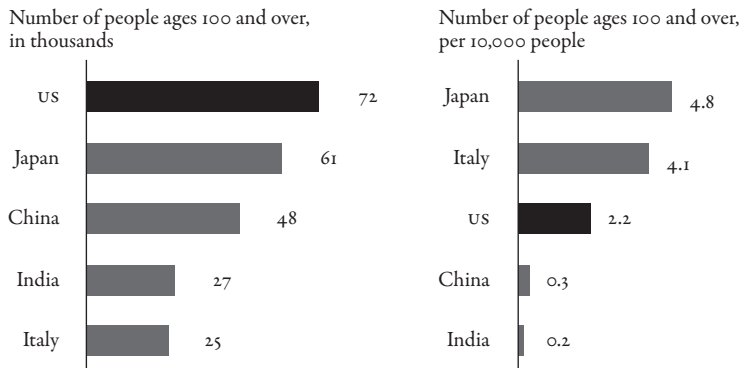
Europe pays high importance to the theme of active ageing of the population, having proclaimed 2012 the “European Year for Active Ageing and Solidarity between Generations”. One of the results of the measures adopted has been the construction of the index “active ageing” to measure the ability of the elderly to be fully realized in terms of employment, social and cultural participation, maintenance of the autonomy. The index uses several indica-

FIGURE 1
Increase in the number of people aged 100 and over in thousands (1990-2050)



Source: UNDESA, 2015.

FIGURE 2
Number of people aged 100 and over in thousands and percentages (per 10,000 people)



Note: These five countries had the most centenarians in 2015.

Source: UNDESA, 2015.

tors, such as the rate of employment, voluntary work, political participation, physical activity, access to health services, economic security. The extent to which external environment is conducive to active ageing of the elderly (including life expectancy, psychological well-being, the use of technologies, the degree of connectivity) is also evaluated.

How is Italy investing in these necessary transformations? In view of these data, policies for active ageing in Italy seem to be almost completely absent, being simply reducible to the gradual transition to retirement and the extension of working lives. Similarly, the panorama of policies for the elderly involvement in social life is rather weak, showing how the concept of active ageing in Italy is almost solely described as labour market participation and delegating other spheres (social, cultural, political) to the free initiative of more or less organized individuals or groups.

In this regard, the Foundation “Italia Longeva” (Bernabei, 2012) has proposed 5 rules as actions to good ageing:

1. Avoid everything that can compromise our future health, e.g. “we are what we eat, and thus we need to pay maximum attention to proper nutrition”.
2. Smoking, alcohol and drugs have more devastating effects in long-term than in short term and hence should be eliminated, while physical activity is the most effective “pill”, but also affections, especially if constant and long-term, “make” people long-lived.
3. Reach the most possible (how/when feasible) economic security (e.g. insurance and supplementary pensions), which ensures health, opportunity to purchase quality food, but also access to appropriate and effective care.
4. Homes too should be planned for the future: services for home automation, such as automatic controls for appliances, lights, gas, water, can not only give us greater security but also guarantee an important financial saving.
5. Technology joins the control of our health: sweaters that constantly make check-ups, intelligent household appliances, tablets and smartphones will be the key to always stay in contact with a competent reference centre or with families (especially if you live alone). They will make us autonomous in many domestic activities and will allow us to take advantage of important home services, if necessary.

The arising question is how all these issues should be linked in a rigorous and critical way to a wider and deeper vision of risk and protective factors.

Once again, it is primarily the biopsychosocial perspective that helps us as a guide. Braibanti *et al.* (2002) recalls the core elements: interaction in the configuration of state of health and disease among processes that operate at macro level; the multifactorial nature of causes and effects; the interaction between mind/body; an active perspective of health promotion, rather than only safeguarding. A global, dynamic, interactive, non-sectoral vision that wants to look at the person, without forgetting his/her specificity and uniqueness, but that can also look at the “social”, the community and its determinants.

In this perspective, how can we frame active ageing? And how active ageing relates to the (increasing?) risks in the development of serious illnesses, such as dementia? It's not by chance that observational and experimental studies on risk factors are growing: early factors (since birth, childhood), psychosocial factors (from childhood trauma to abuse and losses), socio-environmental factors (e.g. pollution, urban planning, genetic and cardiovascular diseases (e.g. genetic mutations, chronic diseases, obesity), as well as lifestyles, social networks, relationships and affections, mental states, and mood disorders. This represents an intertwined multi-dimensional set, which translates into care and services pathways but especially in preventing and supporting perspectives.

Individual factors and social resilience, as capacity and ability to relate to the adverse events of life (body and mind), are involved in the same evolutionary moments and changes: from resilient person to resilient communities.

Moreover, we cannot underestimate the growing inequalities affecting economic and lifestyles (including physical activity), also due to the life's environments, as recently documented by Althoff *et al.* (2017). It follows the importance of using new instruments of observation, monitoring and evaluation ("big data") to control the state of health, but also to preserve, stimulate and develop the cognitive and emotional-relational resources, and keep them always active.

Indeed, the widespread increase in life expectancy is indeed a major achievement related to the improvement of social conditions and technological advances, but "the more years of life" do not always correspond to a better quality of life: the increase of chronic degenerative diseases related to ageing leads to a growth of care and assistance costs.

Research and scientific literature constantly discuss, with different results, about determinants of health and possible correlations, often departing from diseases and fragilities. We have already mentioned it referring to dementia, but we can more broadly refer to the vast panorama of studies on mood disorders in old age. For example, the recent Italian study named SEEDS (Safety and Efficacy of Exercise for Depression in Seniors) about the relevance of physical activity on major depression within the elderly compares two cohorts of patients affected by a mood disorder, showing the treatment that integrates the use of drugs with physical activity is more effective than drug treatment alone (Zanetidou *et al.*, 2016).

Before concluding, we would like to mention some critical points and contradictions that run through the whole framework of active ageing and potential actions to address it.

First of all, we must be careful not to build an oxymoron. Aging is always a condition of loss, of suffering, sometimes of mourning, with deep changes in physical and emotional: if it is not true that “*Senectus ipsa morbus*”, it’s also true that active ageing is not a rejuvenation, a return to the earlier stages of the life and to better somatic and mental related states but, however, produces a significant modification of biopsychosocial processes. For instance, for not a few people retirement does not represent the start of a new life, happy and free from obligations, rather it’s a “shadow line”, which arouses an identity crisis (psychological and somatic) and a loss of social status – especially if important and respected – re-opening old wounds, disappointments, renunciations, neglects, because, as Magris (2016) reminds, «in our society to do is not the predicate but the very substance of the being».

Even places (in social, health, citizenship and rights terms) must be able to encourage and timely support these processes, combining the right balance of personalized medicine (remind that physical ageing is always associated to some health problems), and the use of technologies to know, understand, observe, protect and care, without turning it into a myth that has no limits or bias. It is also necessary not to underestimate somatic risks (mainly cardiovascular, within pathological diseases that are yet not known and/or not dealt with), and also psychological ones related some “best practices” for good ageing, which do not always break the circle of isolation and fragility.

In this regard, Vassanelli (2017) argues:

To me, the “fragility” is the effort of trying to be normal [...] In dominant slogans fragility is the image of a useless and antiquated, immature and sick experience, alien to the spirit of time. Rather in fragility there are values of sensitivity and delicacy, of kindness, of dignity, and of communion with the fate of the suffering of those who are sick [...] To recognize the fragilities that live in secret in the heart of people in different places and moments of their life is even more important than recognizing our weaknesses [...] Fragility is the desire of listening, of making services to the self and to others, which allows us to escape the secret charm of the ideologies, the desert of indifference and selfishness, aggression and violence.

Regarding this aspect, the question raised by Majani (2015) is also stimulating: «Is active ageing a need for the elder?». Majani raises this question about the risk of excessive focusing on physical health, which tends to deny and underestimate the complexity of conquests and losses, the difficulty to balance the imperative to stay active with fragilities and insecurities (of both body and mind).

Thus, the theme of rights emerges as central, especially concerning: *a*) overcoming stigma (in community and operators); *b*) the right to be considered a “person” and not a “cost”; *c*) overcoming the carelessness (and ignorance); *d*) the right to remain at home, receiving support (as well for the caregiver); *e*) the right to receive appropriate services according to the specific clinical condition, based on proper levels of training of the operators as well as on the research of new tools independently from the market. Similarly, differences need to be considered and not underestimated, for instance: *a*) each person is both equal and different, even if suffering from the same disease (personalized medicine); *b*) diversity must be considered as a specificity and as a positive and fundamental value for justice; *c*) inequalities and responsibilities, to work really for overcoming them; *d*) is it possible to provide “care” without compassion?; *e*) from the paradigm of the (alleged) equality to the thought of/about differences.

Finally, it is necessary to put always the dignity of the person at the centre as an essential value, following that: *a*) it is a value to be protected itself for all the collectivity and for each individual; *b*) offending the dignity of the other (especially if weak) is also an offence to our dignity and humanity; *c*) it involves the power of ideas and courage of action, without forgetting that fragility is an asset that protects our identity, and that the dignity of the human person is not an option from where we can free up, how and when we want to (Cembrani, 2016).

It's, therefore, necessary, when addressing these social and technological challenges, to be always careful to the respect of the insuperable limits (concerning, for instance, the hope/claim to the progressive increase of life expectancy), which often produce illusions and resulting delusions with their consequences on people's life. Rather, we should focus on the communication of the “reliable hopes”, as Pope Benedict XVI (2007) masterfully defined, avoiding falling into the traps of science and progress without limits.

The volume *Active Ageing* places itself in this scenario of challenge to the complexity, with a large, lively, curious and rigorous overlook, attentive to diversities of the analysed contexts. Therefore, it represents a valuable source of knowledge, study and research on a topic that risks to be simplified in respect of the manifold variables that define it and, consequently, of the multi-professionalism necessary for the implementation of integrated interventions.

We must be able to leave.
For us, older people, to retire is a virtue.
(Enzo Bianchi, in Griseri, 2017)

The Framework

Guido Amoretti, Diana Spulber, Nicoletta Varani

Progressive ageing of the population has particular relevance in economic and social terms. This fact was known, at least for countries at advanced development, already in the early Eighties. Demographers had begun in those years to speculate on an ageing population scenario that is totally new if compared to the past. The progressive increase in life expectancy and the declining birth rate in industrialized countries have favoured the gradual change of the distribution of the population. In the twenty-first century, the ageing of the population has taken on an all-encompassing starting to affect even the developing countries in which the birth rate remains high, but increases life expectancy. Even if that increase takes the values small percentages it becomes in large numbers of individuals because of the size of the reference populations.

According to the international report on *Ageing and Health* by WHO (2015), people over 60 will go to nearly 2 billion in 2050 from the current 900 million; Japan is the country with the longest life expectancy, Italy is second in the world and first in Europe. Moreover, 125 million people in the world reach the age of 80; but by 2050, only in China, they will be 120 million, while 434 million in the rest of the world. The forecasts for 2050 say that 80% of people over 60 will live in countries with medium and low income. To understand the speed of changing process we must consider that in the last 150 years, in Europe, the elderly population increased from 10% to the current 20%; while Brazil, China and India will achieve the same change within the next 20 years. «At the time of unpredictable challenges for health, whether from a changing climate, emerging infectious diseases, or the new microbe that develops drug resistance, one trend is certain: the ageing of the populations is rapidly accelerating worldwide» (WHO, 2015).

To improve the planet that gets older it's necessary to do a lot and the WHO reports three socio-political conditions. With the premise, that deal with the problem is an investment and not a cost. And the question of ex-

penditure is crucial: for example, as underlined by WHO (2015) report, «Australia and the Netherlands estimated that around 10% of all health-care expenditures reflect the cost of caring for people during their last year of life and that these costs fall with increasing age. In the United States, around 22% of all medical costs may be spent on patients during the last year of life». «In Germany, it has been estimated that 24% of people aged 70-85 years, experience five or more diseases concurrently». Which strategy offers the WHO? The first thing to make the living places much more enjoyable and accessible for older people.

Trans-national investigations, such as the *Study on Global Ageing and Adult Health* (SAGE) of the WHO, the Gallup World Poll, and other longitudinal studies on ageing in Brazil, China, India and South Korea, are beginning to redress the balance and provide evidence for the political systems, but much still remains to be done.

The *Ageing in the Twenty-First Century* report (UNFPA, 2013) makes the point about the Plan of Madrid after ten years of progress in its implementation. The document provides examples of very interesting and innovative programmes capable of responding effectively to the problems of ageing and concerns of older people. The report identifies gaps and provides recommendations on the way forward to ensure the existence of a society for all ages, in which young and old have opportunities to contribute to the development and share its benefits. A salient feature of this relationship is focusing on the voices of older people, recorded through a capillary work of listening throughout the world. The report, the result of the collaboration of more than twenty bodies of the United Nations and other important international organisations involved in the field of population ageing, shows that we have made good progress in many countries thanks to the adoption of new policies, strategies, plans and laws on ageing, but it should be done much more to implement the Plan of Madrid, and to realize the potentiality of our ageing world. The report supports the idea that national and local governments, international organizations, communities, and civil society should engage to the maximum in a joint effort to ensure that the society of the 21st century complies with the reality of the 21st century's demographics. The same document underlines that, in order to have concrete progress, effective in terms of cost, you will need to ensure that the investments on age start from birth. The report identifies ten priorities to maximise the opportunities of the elderly populations:

1. Recognize the inevitability of ageing population and the need to adequately prepare all stakeholders (governments, civil society, private sector,

communities and families) to the increase in the number of elderly people. To do this, it is necessary to improve the understanding of the problem, to strengthen the capacity of national and local authorities, and to make political, economic and social reforms needed to adapt societies to an ageing world.

2. Ensure that all elderly persons live in conditions of dignity and safety, that they have access to social services and basic medical care and they have a minimum guaranteed income through the implementation of national platforms of social protection and other investments of a social nature aimed at increasing the autonomy and independence of older people, prevent impoverishment in old age and contribute to become older in the best conditions of health. These actions should be based on a long-term vision, supported by a strong political commitment and funds so that they can prevent negative impacts in time of crisis or changes of government.
3. Support the communities and families to develop as system with the purpose of guaranteeing to the more fragile elderly the treatments they need over the long term and promote at the local level on active ageing and in good condition of health to support and promote ageing within their community.
4. Invest in young generations through the promotion of healthy behaviours, and providing education and work opportunities, access to health services and pension coverage for all workers as the best investment to improve the lives of future generations of elderly people. It is necessary to promote flexible working, lifelong learning and professional updating in order to facilitate the labour market integration of elderly people (silver economy).
5. Support national and international efforts to develop comparative research on ageing, and ensure that the data and the results of this research, sensitive to cultural issues and gender, are available for the definition of policies.
6. Integrate ageing into all gender policies and gender issues in the policies of ageing, by taking into consideration the different needs of older men and women.
7. Ensure inclusion of ageing people and their needs in all policies and programmes of national development.
8. Ensure inclusion of ageing people and their needs in humanitarian interventions in national plans for mitigation and adaptation to climate change programmes and management and disaster preparedness.

9. Make sure that issues related to ageing are taken into account in development programmes, post-2015, including through the development of goals and specific indicators.

10. To develop a new culture of ageing that is based on rights and a change in mind set and social attitudes towards older people, because the beneficiaries of the welfare state can become active citizens and participate in. For this purpose, it is necessary to work to develop international instruments for human rights and for their transposition into national legislation, together with measures affirmative to combat age discrimination and promote the recognition of older people as autonomous subjects.

Finally, it's important to mention the international "regional" conference "Asia-Pacific Intergovernmental Meeting on the Second Review and Appraisal of the Madrid International Plan of Action on Ageing" held in Bangkok in 2012, in which, through a regional platform, has had the opportunity to present the results and the objectives achieved for the Asia-Pacific area. This brief reference demonstrates how the decision-makers, non-profit organizations, the governments of the geographical area are strongly involved in the policies on ageing.

The goals of the Conference were: the progress made in the Asia-Pacific region in the implementation of Action Plan of Madrid; to prepare the Action Plan for the next implementation cycle from 2013 to 2017 in the Asia-Pacific region; identify key areas for regional cooperation to further strengthen the implementation of the Action Plan of Madrid report of the Asia-Pacific (United Nations, 2013).

Most of the regions of the EU has grown their elderly populations as a result of a significant increase and ongoing life and the hope of the attainment of the retirement age of the baby-boom generation following the second world war. The regions with the highest shares of older people are often in rural, relatively sparsely-populated and peripheral, in which the low share of working age people could, at least in part, be due to a lack of opportunities for education and employment, thus pushing the younger generations to leave these regions to continue their studies or to seek employment elsewhere (Zrinščak, Lawrence, 2017).

The elderly represent a share particularly high of the total population in different rural and peripheral regions of Greece, Spain, France and Portugal, as well as in a number of regions of eastern Germany. January 1, 2015, older people accounted for over one-third (33.7 %) of the total population in the region of Evrytania central Greece: the highest percentage in Europe. Ourense, in the north-west Spain, is the only other region with the level

NUTS-3 in the EU in which the elderly account for over 30% of the total population, as well as one of the three Spanish regions, included among the 10 EU regions with the highest shares (28.5 % or higher) of elderly people in their respective populations.

Many of the statistics are based on an index of ageing a synthetic indicator of population age structure. It represents a dynamic indicator that, much better than average age, allows to put in evidence the level of ageing of the population; it's considered a "coarse" marker of aging since that population aging is generally characterized by an increase in the number of older people and, at the same time, a decrease in the number of younger subjects, so that the numerator and the denominator vary in the opposite direction, enhancing the effect. This index can be used to provide synthetic data relative to the area of interest (for example, the district) on the relationship between over 65 years old and young people and makes possible to compare values between different local realities (municipalities, districts, health care institutions and geographical regions).

From 2000 to 2002 Genoa hosted some international Conferences on the topic of ageing, in particular, the III Conference "Living and curing old age in the world" intended to emphasize from the outset the existence of two intersecting (and sometimes divergent and even conflicting) perspectives about old age and aging that linked to a progressive medicalisation of the subject ageing, implicit in many parts of the western approach, and the one linked to the time of life, typical of many non-western cultures, that emerges today as a pressing question in the heart of the west.

The topics covered by the Conference are:

- a) Medical knowledge and therapeutic, modern and traditional, for the promotion of the elderly health and taking charge of the emergencies. Age-related data medical-anthropology: physical health, psychological and social development of the elderly.
- b) Data analysis of the most recent surveys of social and demographic population ageing.
- c) A perspective on how the problems of old age are perceived in different countries and in different cultures. Age in time and space: different models, different styles of life.

For these reasons, the European Union has created policies and programmes aimed at the third age, to improve the quality of life of older people and increase their self-sufficiency. The commitment of the European Union, in particular since 2012, celebrated as "European year for

active ageing and solidarity between generations”, is concentrated in the financing of good practices aimed at the maintenance of the elderly and their inclusion in a society that on the one hand it cannot be deprived of their contributions in terms of social commitment and civic, on the other, that cannot take charge, at care level, of a portion of the population that, in some of the more advanced countries exceed 28% of the total. But policies pursued by European Union were not only addressed to the member states: the involvement of partners outside the European Union, but geographically close, has represented and represents a fixed point in the strategy of dissemination of good practice.

In the framework of international cooperation agreements, Lomé III in 1985, the European Union has funded programmes in other continents, such as for instance, *Overcoming Fragility in Africa. Forging a New European Approach*.

In order to respond to these challenges the European Commission has forecast several Project Calls and subsequently has financed several projects: some of them are Fp5 – Horizon 2020, TEMPUS, Erasmus Copernicus, and others. We can cite a project that was coordinated by our Department “TEMPUS Centre for Third Age Education” which aim was to promote active ageing through educational programmes in the frame of which European experience was shared to Azerbaijan, Russian Federation and Ukraine.

Another kind of financing in this field is the Structural Funds, the financing schema include in this case also the National/Regional public authority.

All these programmes are aimed to promote research in the active ageing field and to individuate the best practices in order to make an adequate political decision.

The present volume seeks in some way to provide an overview of the phenomenon of ageing at the global level using a multidisciplinary approach and collecting evidence of good practices from different countries many of which developed in the framework of the TEMPUS Project CTAE and presented in various Conferences and international Seminars that were held in the three-year period from 2013 to 2016 than prolonged until 2017.

The contributions in this volume have been organized in three distinct parts. The first, *Value of Ageing and Challenge of the Third Age*, collects writings of general character which, through different disciplinary approaches, try to describe the phenomenon of ageing in different socio-cultural contexts, suggesting intervention policies and possible challenges for the future.

In the second part, *Quality of Life and Lifelong Learning* have been collected contributions that deal with the theme of quality of life and underline the significance of lifelong learning with respect to the condition of fragility, in which elderly people can fall in the absence of adequate socio-educational interventions and a network of powerful relationships.

The third and last part, *Third Age and Activity: Hypothesis and Experiences*, collects the experiences carried out in different countries within the framework of TEMPUS programme, or independently with the aim to further disseminate the best practices implemented in the various socio-cultural contexts that characterize the partner countries of the project.



Section I

Value of Ageing and Challenge of the Third Age



The Concept of Ageing through Time in the World

Antonio Guerri

I.1

Ageing in Time...

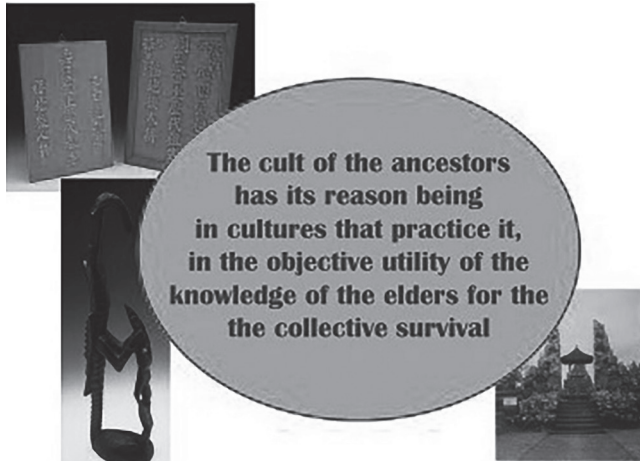
Each of our cells has a programme written in its genetic code, but the possibility of developing this programme depends on the evolution of a dialogue with many stakeholders, in particular with the natural and cultural environment, understood in the broadest sense of the term. The fact that the programme is realised does not depend, therefore, solely on the programme itself.

For humans like other mammals, it has been estimated that the age limit of survival corresponds to about 6 times the period of growth. Given that period ends at around 20-25 years, the limit should be calculated as 120-150 years (Goldstein, 1971). In reality, the maximum age reached (and strictly controlled) differs too much from these borders, therefore we should agree that in the dialectic man-inheritance-environment the latter has the upper hand: this is evident in our species in time and space.

Regardless whether the affirmation of the king of Israel was true or false, there is no doubt that in man the duration of life, is definitely increasing.

H. V. Vallois (1946) carried out a study on the duration of life by examining 187 fossil remains of men: 55% of the Neanderthals examined (who lived between 250 and 40 thousand years ago) died before the age of 20 and only 3 individuals exceeded 50 years of age; 34% of *Homo sapiens sapiens* (35 thousand years ago) died before the age of 20. From the complex of the finds of 78 skeletal adults in Britain, belonging to the Neolithic period of the bronze age (3500-1200 BC), the following data are revealed: 57% died between 20 and 30 years of age, 20% between 30 and 40 years, 21% between 40 and 50 years, 1% between 50 and 60 years, 1% over 60 years.

FIGURE 1.1
Relevance of the elders for collective survival



Source: created by the author.

I.2

...and in the World

From Greek mythology it has been handed down that Medea delayed old age, by using medicinal herbs, making Exon, his father-in-law young again.

Plato regarded the old as those who “no longer being under the dominion of wild and imperious passions, can enact laws of wisdom”.

For the Hindu there are three ages: childhood, age of marriage and of the active life, the age of pilgrimage. In the first, we learn by playing and babbling; the second generates and you create by doing; in the third we listen to what is good and truthful in silence. Each of them passes to the other what he has. Childhood is hope, mature age is security, old age is wisdom.

The Navajos of Arizona, worshiped a deity named Estsanatlei which means “woman who rejuvenates herself”.

People who lived on the island of Viti Levu (Oceania) and practiced the Tuka cult believed in the existence of a water of immortality.

The main purpose of the Spanish explorer Ponce de Leon (1500) was the search for a fabulous water of youth in the Caribbean Sea (Guerci, 2005).

There are a number of elixirs of life as many as there are human populations.

The Eastern world has three main remedies: kwao-kua (*Butea superba*), ginseng (*Panax ginseng*) and pantui (soft horns, not ossified, of speckled fallow deer). Tradition says that you should make ample use of the two plants prepared in infusion, and of animal derivatives, pulverised and ingested (Scarpa, 1980).

Regarding the West, already in historical medicine we can find chapters concerning old age in the "Book of foods", in the "Air, water and places", and in the *Aphorisms* of Hippocrates. In the first century BC. Asclepiades of Prusa advised massages and tonic baths to the old regimes. In the Middle Ages, we witness an intense "gerontological" research on the part of the alchemists and, curiously, Raimondo Lullo serves alcohol (?) as one of the best remedies.

With regard to contemporary long-lived populations it seems that the "elixir" is represented by altitude (most of them live over 900-1,000 m above sea level) and by extensive use of sugar cane starting from a very early age. These long-lived people (of the Caucasus and Andes) tested for glycaemic load, would react with a high ability to burn carbohydrates that was observed in the West only in young subjects (Verzar, Sirtori, 1975).

It may be interesting to recall how some ethnic groups, which rarely reach 60/70 years, have the peculiar physiological characteristics until their late age. For example, in Masai (breeders of Eastern Africa), whose power is based essentially on meat and dairy products, hypertension is absent, oxygen consumption is high, and with age they do not gain weight; in Pygmies (nomadic hunters of Central Africa) the diet is mostly vegetarian, with age, there is no increase in weight but hypertension is present. With ageing in Indians, weight does not increase nor cholesterol or blood pressure.

Instead in the current Japanese population, with age, pressure increases significantly, probably also because of their diet rich in salt.

While it is certainly true that industrialised countries have a higher life expectancy, and therefore a higher percentage of elderly people in relation to the total of citizens, the higher number of elderly people in absolute value (more than 360 million people over 65 and nearly 60% of the total of the elderly) lived in non developing countries already in 1999 (WHO-OMS, 1999).

The discrepancy between "being" and "doing" in an age when this identification "no longer holds", sends into crisis (social, economic and po-

litical) a Western system that is concerned to find new strategies to overcome old age in all its manifestations (forgetting what nature has prepared from when man existed), and sends the crisis of the elder himself, who in Western society is confronted with a self-perception that brings him back to a “productive social function”; yet has not the elder in himself already, as a human being, his “function” to exist?

It is always important to remember the syllogism of Nabokov, a daily mirage for many in the West: other men die but I am not another: therefore I’ll not die.

Despite the feeling of transience and fragility, more present in old age, the elder is an explorer who faces a new adventure in a continuum of existentialism characterised by the transition from physiological maturity at the third and fourth age. The size of the journey ahead of us encourages the expectations of a better quality of life, strengthens the project and frees the potential energy that the older may express.

The hope of E. Greppi is as timely as ever, addressed to researchers working in the field of gerontology: the important thing is not to add years to life but life to years (Greppi, 1956).

Elderly People in Africa: Between Stereotypes and Reality

Guido Amoretti

2.1

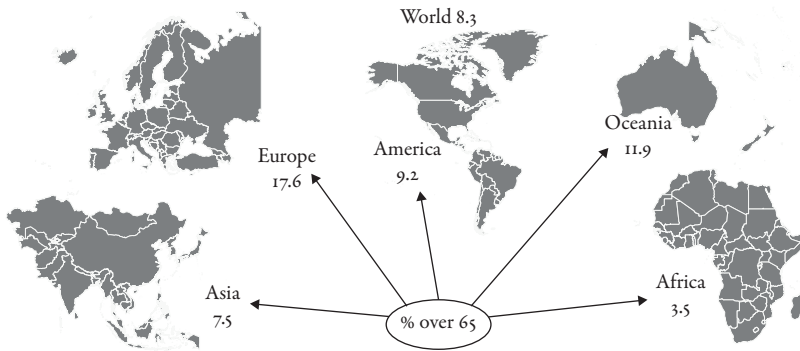
Introduction

People ageing is a matter of fact. Nonetheless, this phenomenon is quite different according to the geographical areas of the world. Europe, the ancient continent, has 17.6% of people over 65 years against 8.3% in the world (FIG. 2.1), with large differences between countries and within the same country. For instance, Italy, Greece, Germany, Portugal, Finland and Bulgaria, ordered by decreasing percentage values, have more than 20% of people over 65 while many other countries do not reach 15% (Moldova only 10.1%) (UNDESA, 2015). Italy (22.4% of people over 65) shows noteworthy differences by region: Campania reaches values under the national mean (17%) while Liguria has the highest percentage of elderly people (28%) (ISTAT, 2015). Oceania (11.9%) and Americas (9.2%) go beyond the world's mean, Asia is slightly lower while Africa with 3.5% of people over 65 is dramatically far from the world ageing trend.

Demographic differences among the five continents can be explained by means of different birth rates, infancy mortality rates, economic development speed, natural resources and environmental and historical factors. A comparison between six population pyramids (FIG. 2.2 the Americas are split into two figures) makes the different trends clearer according to geographical position.

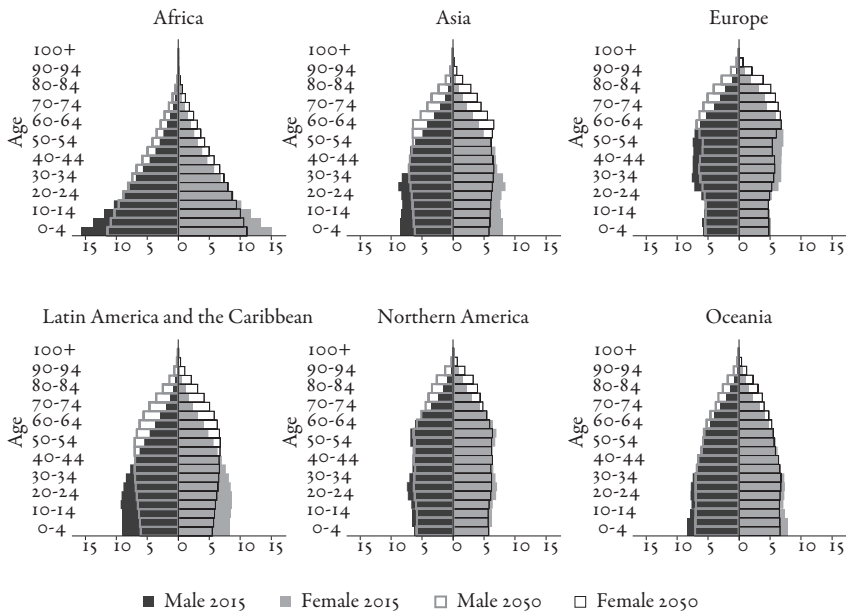
Only Africa's population distribution shows the typical pyramid shape with a larger base (the younger) and a smaller apex (old people). Differences in the distribution by age between Africa and Europe are shown well comparing two representative countries (Uganda and Italy) which have opposing social emergencies: infancy and elderly (FIG. 2.3). The pyramid shape of Uganda's population distribution shows that this country has a greater number of children and adolescents while the portion of adults older than 49 years old is quite small. On the contrary, the bulging shape

FIGURE 2.1.
Percentages of over-65 people on the five continents



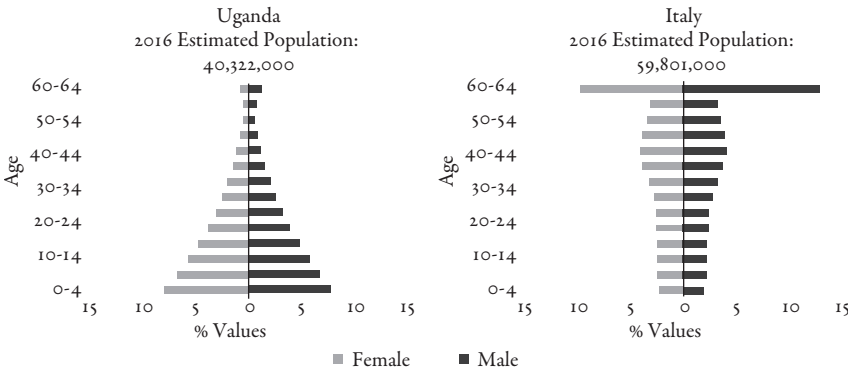
Source: UNDESA, 2015.

FIGURE 2.2
Population distributions by age and gender: Continent comparisons (percent of population)



Source: UNDESA, 2015.

FIGURE 2.3
Africa's pyramid *vs* Europe's bulge. Population by age and gender: Uganda *vs* Italy 2016



Source: UNDESA, 2015.

of Italy shows a similar percentage of people pertaining to four-year classes between 0 to 34 years old, a significant increase in the age classes included between 35 and 64 years and an impressive explosion in the class 65 and more. Nevertheless, over the next 50 years, the African population distribution by age will quickly change showing a relevant increase in older people together with a substantial stability of younger, so that social and health problems of the elderly will be added to hunger and illness which affect the young population.

Different continents mean different demographic trends that is different social emergencies and actions to cope with. But do these differences change how old people are perceived and which social policies are chosen?

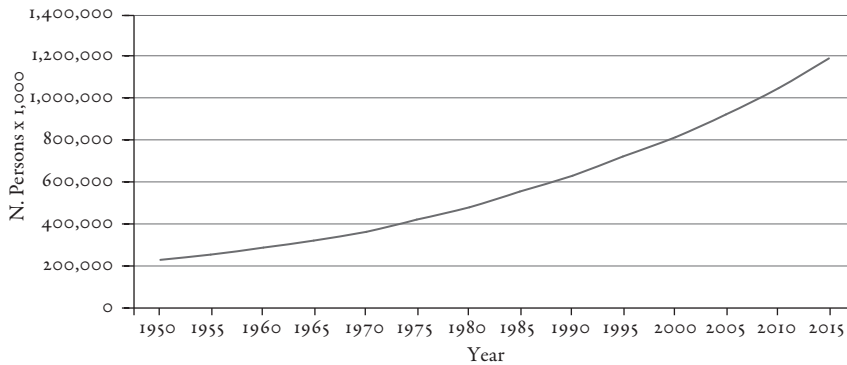
Once more we can find the answers looking for some demographic indexes.

2.2

Some Numbers on Africa's Population

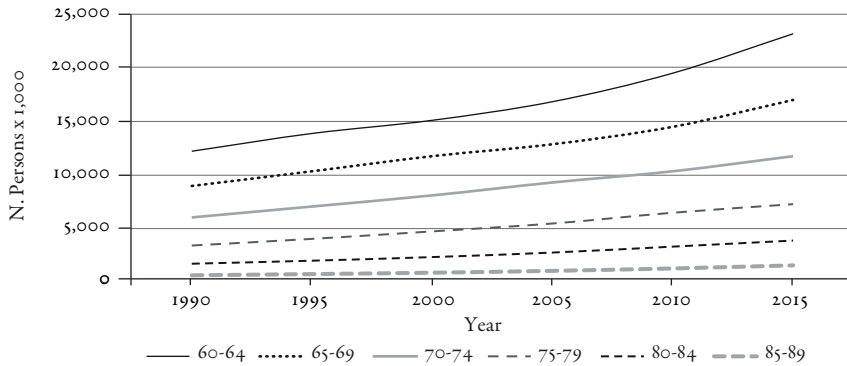
Africa has more than one billion people and its population is constantly growing so much that at the end of this century it will almost reach four billion inhabitants (UNDESA, 2015). The number of sixty-year old or more

FIGURE 2.4
Number of people of 60 and more years old in Africa from 1950 to 2015 (in thousands)



Source: United Nations, 2017.

FIGURE 2.5
Age distribution of 60 years and over in Africa from 1990 to 2015 (number of persons in thousands)



Source: United Nations, 2017.

has increased following a parabolic trend and reached almost 120 million people in 2015 (FIG. 2.4).

Total fertility rate is the principal reason for such a fast growth: in Africa every woman has 4.7 children (the observed value in the world, 2.5, is almost half) while each European woman has only 1.6 children. Another interesting demographic index, crude birth rate, tells the same story: 36 births per 1,000 inhabitants in Africa *versus* 11 in European countries that

is only partially weakened by similar crude death rate values (10 deaths per 1,000 inhabitants on the African Continent *versus* 11 in Europe) and under five years old mortality (15 times larger in Africa than in Europe). Percentage of births to women under 20 is another impressive data: in Europe only 4% of under-20 women have a child against 14% in Africa. In spite of fast population growth, life expectancy at birth is noticeably lower in Africa (60 *vs* 77 years in Europe): five European countries are listed in the top-ten world countries with the highest life expectancy at birth in the period 2010-2015 but all the countries listed in the top ten with the lowest life expectancy at birth in the period 2010-2015 are African. In light of these data, it is not surprising that 41% of African people are under 15 years and only 5% are over 60 while Europe has 16% and 24% respectively. In order to analyse different classes of age within elderly people, it is quite interesting to note that until 1985 old African people were classified into five classes the last of which included persons of 80 and more years old. Starting from 1990, demographers split the eighty and more into two different classes (80-84 and 85-89) meaning that a significant number of African people was able to reach those ages. Taking a look at the age distribution of elderly Africans we can easily note that all the classes were likely to double in absolute values in the last 25 years (FIG. 2.5).

Changes in quality of life and health policies of African countries will almost double the over-60 people by 2050 so that also in Africa elderly people will be an emergency. For now, the elderly condition in Africa may be analysed verifying whether a correspondence exists between tribe-wise man concept, that can be assimilated to old people's role in pre-industrial societies, and how modern African societies take into account ageing people.

2.3

How Are Old People Considered?

Each society has different points of view on ageing and the role of elderly people. In highly developed societies old people were previously considered for their wisdom, then they became merely retired, no longer productive and almost ineffective, but recently they have reached a new role for their families as grandparents and regarding the whole society by means of their experience and as voluntary workers.

The situation is very different in African societies in which old people are not numerically relevant but may have different roles and need some kinds of safeguard.

According to Bernardi (2006), old African people may be split into three categories:

- “Young old” who have social consideration, executive role in social and economic life and are sexually active.
- “Regular old” who are still involved in making policies and ritualistic decisions and preserved as regards physical and intellectual abilities excluding sex.
- “Decrepit old” who preserve a ritualistic and magical power proportional to their age: people believe they are able to curse even after their death and their funeral services are so regal as to avoid falling out with their souls.

Some ethnic groups feel respect for ageing people but the principal reason is interest not solidarity. In fact, the elderly are frequently herd owners or have several plots of land and young men who take better care of them may become owners of many properties.

But when old people fall into the third category, “decrepit old”, they can more easily become victims of aggression, persecution and sometimes murder.

2.4

Ageing and Witchcraft

As we said, “decrepit old” are endowed with magic power increasingly together with their age.

To be considered endowed with magic powers, old people, both male and female, may be charged with witchcraft and subject to aggressiveness. Females are easier victims of aggression and, in the worst cases, murder. This phenomenon is so widespread that, owing to old people increasing, the Africa Union Conference of Ministers of Social Development, that was held in Addis Ababa from May 26th to 30th 2014, approved the Draft Protocol to the African Charter on Human and Peoples’ Rights on the Rights of Older Persons in Africa. Particularly section 10 paragraph 2 of the Draft Protocol concerns behaviour against old people of both sexes. It says «State Parties shall enact legislation that protects Older Persons from

false accusations based on stereotypes and harmful traditional practices» and more specifically section 11 paragraph 2 invites African Union Nations to «take all necessary measures to eliminate harmful social and cultural practices, including witchcraft accusation, which affect the welfare, health, life and dignity of older women».

The fact that the Africa Union Conference of Ministers of Social Development felt the need to underline the old people's dangerous condition means that ageing is already a social problem for African countries and it will grow in the near future in parallel to the increasing numbers of people over 60.

2.5

What about the Future of the Elderly in Africa?

The life of old African people seems to be rather different to the life of elderly before the economic boom: they are considered wizards not wise men or women and they frequently suffer oppression by young people so laws must safeguard first of all their lives and rights then their economic, social and health needs. From a psychological point of view, this situation is produced by social stereotypes according to which old people missing sexual activity lose their full active role within African society. Believing in this idea of elderly, young people show less deference unless old people own land and/or herds. But most African old people are poor: however, the young fear the elderly without logical reasons only because of some ancient superstitions according to which old people have magic power and are able to damage other people. In the coming years, Africa will need a cultural change with respect to old people and what young people think about them. Moreover, the presence of a large number of old people will increase health and social problems as in Europe but without efficient health systems, social security cushions and enough economic resources. We can easily foresee an emergency situation in Africa even if a cultural change with respect to old people happens. In effect, increasing the number of over-60 people will mean increasing gerontological pathologies, i.e. increasing needs for health care, medicines, psychological, social and economic supports, but it is difficult to imagine that African countries may have sufficient resources for a large number of people. Infancy and adolescence emergencies, owing to the larger number of people involved, will probably employ all the few available resources making the elderly conditions more dramatic.

The Extreme Geographical North and the Wise-Elder Image. A Reflection Comes from Scandinavian Literature

Simone De Andreis

3.1

Introduction

In the realisation of this paper we have used the essay *Höðr's Blindness and the Pledging of Óðinn's Eye: The Symbolic Value of the Eyes and Blindness of Höðr, Óðinn and Þórr* of Annette Lassen (The Arnamagnæan Institute, University of Copenhagen), in G. Barnes, M. Clunies Ross (eds.), *The 11th International Saga Conference: Old Norse Myths, Literature & Society*, University of Sydney (Lassen, 2000).

Besides, we have had precious help from the reading of the texts by Gianna Chiesa Isnardi (University of Genoa) *Storia e cultura della Scandinavia. Uomini e mondi del Nord* (2015) and *I miti nordici* (2008).

This paper is divided into two parts: in the first we describe the mythological character of Mimir, in the second we analyse the geographical environment where Mimir lives.

3.2

Scandinavian Mythology

Mimir is a giant in Norse mythology, and is renowned for his wisdom. Several things indicate that Mimir may be a giant or at least connected to giants (Lassen 2000, p. 224). Giants pose a threat to civilisation, while gods most often try to sustain order. Due to their geographical placement in the mythical world, giants are connected to the uncivilised: they live far away from the centres of civilisation, Ásgarðr and Miðgarðr, and they are associated with cold and frost (Lassen, 2000). Being connected to the realm of the giants, Mimir would thereby be connected to this concept of the uncivilised.

FIGURE 3.1
Óðdin questions Mimir



Source: Emil Doepler der Jüngere (1855-1922), illustration from *Walhall: Die Götterwelt der Germanen* by Wilhelm Ranisch, Martin Oldenbourg Verlag, Berlin 1905.

The god Óðin went on a journey to Jötunheimr, the land of the giants to acquire omniscience of Mimir.

God caught him drinking from the magical source of Mimir, Mímisbrunnr, and in exchange for new knowledge obtained, Óðin was forced to give one of his eyes. Mimir is wise because he drinks from a well, indeed he is closely associated with a magical well of knowledge that bears his name, the Mímisbrunnr. There is, therefore, no doubt that Mimir is, in some way, connected to the underworld. The water in Mimir's well is thus also connected to the underworld. In fact, the element of water in Old Norse mythology is generally a symbol of forces that cannot be confined (Lassen, 2000). Furthermore, water is connected to the female deities: Frigg lives in Fensalir, Sága lives in Sökkvabekkr and Urðr lives in Urðarbrunnr. In addition, sacrifices made in water are made to the Vanir (*ibid.*). The associations of water therefore relate well to the chthonic character of the Vanir. Mimir is, accordingly, of the same nature, and so is the wisdom in his well.

This underlines the importance of water and nutrition for a long and healthy life.

Óðinn is the supreme god, he is wise and possesses second-sight, and he is, as is well known, one-eyed. The pledging of Óðinn's eye is mentioned in *Vfluspá*, stanzas 27-28, and *Gylfaginning* in Snorri's Edda

(*ibid.*). As we can read in Gylfaginning, Mímir's well is under the root of Yggdrasill which points in the direction of the realm of the Rímflursar. Here wisdom and reason are hidden. It is furthermore told, that Mímir is wise, because he drinks from the well every morning. Moreover, we hear that Óðinn once asked for a drink from the well but did not receive anything until he pledged his eye. Most scholars agree that Óðinn, by the pledging of his eye, receives access to Mímir's knowledge (*ibid.*). Furthermore, Mímir is dead: in Ynglinga saga we can read that the Vanir decapitated him and sent the head to Óðinn.

Indeed, there are two versions of how Óðinn came into possession of Mímir's knowledge:

- a) Mímir is decapitated, which can be read as his removal from his chthonic origin.
- b) Óðinn pledges his eye to get possession of Mímir's knowledge. Thus, an act of approaching takes place in both versions of the myth, either Mímir must approach Óðinn symbolically or vice versa, in order for Óðinn to achieve access to Mímir's knowledge.

We must assume that Óðinn, in the pledging version, wishes to get possession of knowledge connected to the Vanir, the feminine and the chthonic. Margaret Clunies Ross, in her study *Prolonged Echoes*, volume I, shows that qualities such as intellectual creativity, civilisation, and life are connected to the realm of the masculine in Old Norse mythology, while disorder, death and sexuality are connected to the realm of the feminine (*ibid.*, p. 225). The knowledge that Óðinn wishes to achieve would thus be connected to the feminine realm. This is linked with the interpretation of the myth of Óðinn's conquest of the skaldic mead of Jens Peter Schjødt: the wisdom, represented by the skaldic mead, does not become fruitful for Óðinn until it has been in the possession of a woman in the underworld (*ibid.*). To achieve this specific knowledge, Óðinn sacrifices an eye. In this way, Nordic mythology also confirms, as we can read in statistics: women live longer. Given the symbolic value of eyes (masculine strength and status), it seems that Óðinn indeed surrenders a part of his masculinity to achieve a share in the chthonic and feminine knowledge hidden in Mímir's well. In general, it seems that civilisation, which is associated with the Æsir and the masculine, is represented in Old Norse mythology as being superior to the earthly and watery elements of the uncivilised, associated with the Vanir and the feminine. But surprisingly enough the myth also shows that Óðinn, by sacrificing a part of his masculinity, achieves supreme wisdom from a feminine source.

The numinous wisdom is, therefore, created by uniting the feminine and the masculine. Óðinn's connection to the feminine realm cannot be read as an indication of weakness. Else Mundal has interpreted the alliance with the forces of chaos as a way to release the creative potential of these forces (*ibid.*). The transgression of taboo contributes to the constitution of Óðinn as the supreme god of the Old Norse pantheon.

The source of Mimir is added to the other three means that Óðdin has to get information and they are: *a hásaeti* ("high-seat") in Ásgarðr from which he could perceive all that went on in the nine worlds; two ravens, Huginn and Munin, who flew around the worlds and returned to perch on Óðinn's shoulders and supply information (*ibid.*); finally, there was the gaining of the runes, i.e. secret, occult knowledge of the wisdom behind all things, by sacrificing himself on one windswept tree for nine nights and days (*ibid.*).

For the figure of Mimir the main literary reference, but not the only one, is the *Gylfaginning* ("The Deception of Gylfi"), which is the first part of Snorri Sturluson's *Prose Edda*.

Who is Snorri Sturluson? Snorri Sturluson (Hvammur, 1179 – Reyk-holt, 1241) is an Icelandic historian, poet, and politician. Snorri was born in Hvammr, West Iceland, in 1179. His father Sturla Þórðarson belonged to the Sturlungar family, one of the most influential on the island; his mother was Guðný Böðvarsdóttir. He had an older brother, Sighvatr, and a younger, Þórðr. But while his brothers remained in Hvammr, Snorri was raised, from the age of three, by Jón Loftsson, according to a very common practice at the time, with which agreements or alliances were signed. Jón had ancestors in the royal Norwegian family; was one of Iceland's most powerful leaders, but also a man of great erudition. Snorri spent his youth at Oddi, which was then one of the main intellectual centres of the island, and there he discovered so much of the classical Christian culture as the traditional Norwegian literature, with its mythological songs, heraldic poetry and epic-historical narrative of the sagas. He belonged to an authoritative family, with a passion for letters joined to political ambition (he was twice the president of Althingi, the legislative assembly of the island), which led him to play a prominent role during the Icelandic struggle to conquer total independence from the Kingdom of Norway. Indeed from 1215 to 1219 he was the owner of the highest Icelandic office (*Lögsögumaður*), the "enunciator of the laws" at *Alþing*, the supreme political and legal assembly of free men. The ambiguity of his position at this stage was the cause of his brutal killing by the king of Norway.

He is the author of the *Prose Edda* or *Younger Edda*, which consists of a header and prologue *Fyrirsögn ok Formáli*, that is a biblical and euhemeristic introduction in which Snorri begins with Adam and Eve and comes to talk about the arrival of Æsir, coming from Troy, in Scandinavia; and three parts: the *Gylfaginning*, a narrative of Norse mythology, the *Skáldskaparmál*, a book of poetic language, and the *Háttatal*, a metrical treatise. *Prose Edda* constitutes one of the main monuments of Icelandic medieval literature and at the same time one of the richest sources of ancient Scandinavian mythology. This name, Edda, has long been known as “ava” or “grandmother”. Recently, however, he wanted to approach the term “song, poetry”. Both interpretations have good reasons to be accepted. The first interpretation places the emphasis on the myths, fables and ancient traditions narrated by a grandmother to the new generations; the second sees the book as a kind of manual for hot aspirants, as Snorri seems to have intended to do. *Prose Edda* turned out to be the pretext of telling Norwegian myths and legends.

He is also the author of the *Heimskringla*, a history of the Norwegian kings that begins with legendary material in *Ynglinga saga* and moves through to early medieval Scandinavian history.

In the first part of this paper we have investigated the figure of Mimir in Norse mythology; now we continue with a geographical reflection about the places of Mimir.

3.3 Geography of Jötunheimr

Where is Jötunheimr? The Jötunheimr, in Norse mythology, is the world of two types of giant: rock and ice. From this place they threaten humans who are in Midgard and the gods in Asgard (from whom they are separated by the river Iving). But Jötunheimen is also a mountain area largely undisturbed in Eastern Norway, covering an area of about 3,500 square kilometres, including the highest mountains in Norway: Galdhøpiggen (2,469 m/8,100 ft) and Glittertind (2,464 m/8,087 ft), as well as waterfalls, rivers, lakes, glaciers and valleys. The area has the largest concentration of mountains higher than 2,000m (6,561.68 ft), in Northern Europe and offers some of the most spectacular tours of the continent – with everything from short strolls to more refuge to another epic day. The high point (metaphorically, if not literally) is the path from Memuru-

bu lodge to Gjendesheim lodge, along the narrow Besseggen ridge. The south views over a lake Gjendevatnet emerald (984 m above sea level) and north over Lake Bessvatnet (1,373 m above sea level) are as good as trekking gets. Jotunheimen, which is the most popular national park in Norway, and the surrounding area is ideal for cross-country and alpine skiers, cyclists and climbers who enjoy the experience of basically undisturbed nature and fresh air. Other popular activities in Jotunheimen include glacier walking, rafting, climbing, caving, canyoning and hiking. Galdhøpiggen climbed for the first time in 1850 by Lars Arnesen (teacher), Ingebrigt N. Flotten (church singers) and Steinar Sulheim (farmers). Jotunheimen was the name given to this mountain area by the Norwegian author Aasmund Olavsson Vinje in 1862, under the inspiration of the wild landscape and Norse mythology. The “Jotun” – trolls – have their home here. Jotunheimen has a long culinary tradition and some popular local products include herbs from the Aukrust Farm and cured meats from Skjåk. Several farms produce and sell their own meats, cheeses, bread and jam. The Jotunheimen National Park, with the same mountain range, extends for approximately 1,150 sq km in the southern part of Norway. It is exactly at the centre of an imaginary triangle between Oslo, Bergen and Trondheim. In the summer months, there are many possi-

FIGURE 3.2

Ancient map of Scandinavia (Gerhard Mercator-Svecia et Norvegia cum confinys)



Source: Wikimedia Commons (https://it.wikipedia.org/wiki/File:Gerhard_Mercator-Svecia_et_Norvegia_cum_confins_1595.jpg).

FIGURE 3.3
Galdhøpiggen



Source: Wikipedia (<https://en.wikipedia.org/wiki/Galdh%C3%B8piggen>).

bilities for exploring the park: there are hundreds of trails marked and maintained by the “DNT” (the equivalent of the Italian CAI) and dozens of days-long excursions.

In this geographic area, among the largest wooden churches in Norway we find Stavkirke of Lom, about 60 kilometres west of Otta in the Gudbrandsdal valley. Lom is famous for its extensive history, for having one of the few remaining stave churches in Norway, and for lying in the midst of the highest mountains in Northern Europe. This town is a Norwegian municipality in the county of Oppland, district of Gudbrandsdalen, in Eastern Norway (Østlandet). This region is one of Norway’s five major geographic regions (Landsdel) and it corresponds approximately to the east of the country, and comprises the counties (*fylke*) of Telemark, Vestfold, Østfold, Akershus, Oslo, Buskerud, Oppland and Hedmark.

It is the most populated region of Norway, also thanks to the most bearable climate and morphology. The church (Stavkirke of Lom), was built in 1158 in Romanesque style, in 1634 it was enlarged and enriched by the tower. The church has three aisles and beautiful paintings can be admired on its walls made mostly by Eggert Munch, the most productive and important Norwegian painter of the eighteenth century. Lom’s church is one of the few in which the original medieval crest survives decorated with

a dragon's head. In the cemetery outside the church you can see medieval stone crosses and the poems of the poets Olav Aukrust and Tor Jonsson.

A *stavkirke* (stave church) is a medieval church built entirely of wood. The structure of the walls is made up of vertical staves. The load-bearing staves (*stafr* in Norwegian language) gave the name to the construction technique. Churches of a similar type are churches with palisades. All existing *stavkirke*, except one, are in Norway. The only church of this kind that remains outside Norway is one of the fifteenth century at Hedared in Sweden.

3.4 Conclusion

At the end of this work, we ask: What is the sense of these pages? The common theme of this pages is the ancient idea that health and wisdom come from the right mixing of nutrition (e.g. water for Mimir) and environment (e.g. mountains with fresh air).

Active Ageing Between Possibility and Necessity

Marco Schiavetta

4.1

Introduction

The upgrading of skills, even in later life, at that stage of life which is denoted as elderly, is a social and psychological need for people. On the one hand, the rapidly changing labour market does not guarantee continuous careers for an individual in the same company and often even in the same job profile. On the other hand, raising the retirement age and economic status, which being retired often involves, are factors that affect the individual both socially and psychologically. In both situations, Lifelong Learning, supported by a coherent Lifelong Guidance intervention, is both a choice and a necessity for individuals now defined as elders.

Scenarios of a possible future

In a publication titled *Lives on the Run. How to Save Oneself by the Tyranny of the Ephemeral* (2009), Bauman represents the time of modernity as a set of fragmented points. In this vision, individuals are unable to plan a future direction, but they must live momentarily, in a dimension of “here and now”.

This does not allow people to plan or realise projects, desires and dreams but “occasions” to be consumed quickly and greedily. According to a logic that does not motivate building a future but enjoying the most effective possibility of the moment. So, they live in the dimension of the momentary as a form of protection from the anguish of a life without perspectives.

The virtuous cycle of social engagement (Timonen, 2016) helps us understand how individuals are actively involved (FIG. 4.1).

An extended life changes life itself, enriches seasons, opens new horizons and also changes the language: the 60 years old once considered definitely “elders” have become “late adults”.

Demographics certifies this, having increased the age of five to nine phases: in addition to the discovery of a later stage of maturity, “the late adult” age

FIGURE 4.1
The virtuous cycle of social engagement



Source: Timonen (2016).

(between 55 and 64). The “young elderly”, as well, are no longer an oxymoron, but the group of those who are in the range between 65 and 75 years. One only becomes old after the age of 75, to slip into the “big old” (that of no self-sufficiency), only over 85 (Saraceno, 2013).

Life has acquired complexity, but also uncertainty and to remain active “agents” seems the only prospective; as Marc Freedman argued in his book, *The Big Shift: Navigating the New Stage Beyond Midlife*, where he envisions a future in which millions of people in their sixties and seventies will remain in work and will subsidise the “real” over eighties. The situation discussed above highlights the fact that policies concerning lifelong learning and skills recognition promoted at all levels (regional, national, European) are still under explored and under studied in relation to social scenarios.

As is known, one of the main factors on which Italy may base its economic and social development, lacking raw materials, is represented by the ability of its people. For this reason, the increasingly widespread use of innovation, not only technological, in the various sectors and globalisation add a lot of pressure to find appropriate policies to ensure that people have the skills needed to live and work in the twenty-first-century society (Di Francesco, 2014, p. 9).

Education, training, development of reflexivity in professional practices and the ability to learn lifelong, life-wide and life-deep, become, more and more today than in the past, the conditions necessary for the effective exercise of active citizenship. These four variables, which are otherwise present as re-

sources for individuals, have become the safeguards to guard against multiple risks of marginalisation and exclusion from the labour market and social life.

4.2

The Importance of Lifelong Guidance for Active Ageing

These are very important issues, that today are manifested in all their dramatic trials from younger generations in search of their first job, but they involve more and more, even over-50 generations. That is, the “late adult” age group, emerging from the labour market due to the economic crisis and the over-sixty, the new “old men” retired from work. The latter often need to work because the economic value of the pension is not enough and is often the only reliable item for entire families.

All these subjects, today, are required to respond “flexibly” to the needs of a development dominated by ever more complex scenarios, by continuous transformations which require constantly questioning established habits, to reorganise their existence, to rethink themselves and their identity (Alberici, 2002).

Writing about lifelong guidance means first putting behind a consistent methodology whose setting are its assumptions in a clear reference theoretical model, but especially in some well-stated basic choices. Therefore, the perspective with which one approaches the topic intends to place itself in a broader context with the support of updated scientific data and experience in the field of more than ten years, which is supported by a relational model.

In a historical and cultural background of great change, dominated by new and increasingly sophisticated communication technologies, in fact, a conception of “orientation” (guidance) is no longer unthinkable, that does not put at the centre the subject. Putting the subject under guidance in a critical manner in the complex reality in which (s)he lives, to be able to make his/her own life choices in the future in line with his/her personal project on continuous monitoring and repositioned in relation to environmental and labour contingencies.

Choices in which the subject “agent” (Bourdieu, 1995), believes and invests (both motivational and emotional), to commit to manage and overcome difficult situations, in the path which (s)he identified as corresponding to his/her “self-realisation” (life project). For adults, including the elderly, and to those who live outside the traditional training cycles and try to return to the labour market, guidance is designed as a check and capacity, such

as using their own resources and acquisition of new skills such as providing support to self-regulate their education and career; but it must also be able to transmit, especially for those over 50, and an image can be realised that their future is both personal and business.

In this perspective, guidance can be defined as «a broad and complex process that involves the individual and the community. It is the result of a cross-training effort of multiple agencies and social institutions (vocational training, school, college, family, groups, associations, enterprises, employment services, etc.), of various professions and different social partners, policy and economic in play. This presupposes coordinated action that allows the participatory interaction, in a triadic system organised, including the labour market, training/education and recipients of the service» (Del Core, Ferraroli, Fontana, 2005).

The guidance process with its services and methodologies, is concretely implemented with the interconnection between three basic dimensions or macro areas of intervention that characterise it: the information dimension, the formative dimension and that of counselling. This is not the kind of intervention of separate sectors, but of constitutive functions of the guidance process as such; they are integrated within a same path, in order to obtain an “orientation” that takes into account any necessity of the person even implicit ones that operators can understand in the personal narratives of the subjects.

This involves very innovative targets, especially if it is assumed that it is the formative dimension to bring together any intervention in the sector, with specific goals relating to:

- the development of the individual self.
- the ability for self-evaluation.
- being able to make independent choices.
- building their own life project.
- coping with change.
- knowing how to manage their personal, social and professional lives.

Guidance does not mean “direction”, but involves psychosocial and pedagogical aptitude (training), that needs to be seen as an accompanying path to continued growth (regardless of age) of the person. The purpose is to promote the individual’s ability to recognise the methods and styles of behaviour (exploiting those that are functional and abandoning “winning” ones), that emerge from the inside of oneself, to allow one to be effective and achieve one’s goals.

Guidance is configured as a concrete way of promoting individual and social development, right through to the choice of education paths, in the

practice of freedom and active self-determination (Walls, Little, 2005). Guidance should be seen as a support given to the individual to resolve issues related to the profession, to the selection or to change of the same, taking into account one's characteristics and the opportunities in the labour market; it should be seen as a possible choice and continues in time.

4.3

Being Able to Handle Transition at All Ages

In the psycho-socio-pedagogical perspective, guidance is a process designed to put the subject in a position to know how to move in a conscious and appropriate way, especially in transitions. Transition situations are the set of concrete events that bring out different guidance needs of the individual to require the development of appropriate skills to cope.

Guidance interventions tend to perceive the "crisis" of the transition not only as a threat to balance, but also as an opportunity for development and emancipation, then they tend to identify the subject himself, the successful completion of the transition strategies, that may materialise as real insight or vision guided. The guidance activities are also characterised from the point of view of the communicative style of relationship that you choose to adopt. In the psychosocial and educational approach reality, shown here as psycho-socio-pedagogical, the choice is effective to set the guidance activities and relationships that underlie them, according to the theories of the helping relationship (Mucchielli, 1987, p. 18).

Centring on the "client" (Rogers, 1994) has not only an ethical reason (or is not only ethical), but also includes a technical reason; the helping relationship has as its main purpose to restore autonomy, dignity and self-esteem to the person. Then it is "technically" necessary that the person is treated so that (s)he can experiment, already in the process of help, an adequate and authentic atmosphere of self-determination, empowerment and enhancement. That is to say that a successful relationship makes the subject able to be activated; the process aid is intended as a workout autonomy that the person will go through the same help process, to conquer empowerment (Bruscaglioni, 2007).

In the framework of the European strategies for employment, the Lisbon European Council includes continuing education (lifelong learning), considered no longer simply a matter of general and vocational training, but as the guiding principle of supply and demand in any learning context and states that, in a lifelong learning framework, easy access to information and

to a quality approach to education and training opportunities throughout one's lifetime must be guaranteed to all.

In this perspective, Europe leads in the direction of a permanent system of guidance services, recognised in the paradigm of lifelong guidance, so that access to qualified guidance is guaranteed to every citizen over the course of life (Vattovani, 2011). Promoting the ability to actively position oneself in productive social life requires: «the raising of social awareness levels, participation, accountability, reflexivity, which goes hand in hand with raising the level of learning, as well as with the development of skills and critical thinking skills, reflection and objectivity» (Striano, 2010, p. 7).

These skills need to be valued and capitalised through a psycho-socio-pedagogic guidance model to support each person in his/her existential design. It is about expressing self-directed intentional skills and modes in which individuals do not remain passive but take a primary role in the design of personal and realistic plans that are anchored to reality and its concrete opportunities.

The general responsibilities, also acquired life-wide and life-deep, are the heritage of resources essential for every citizen and acquire a policy value to the extent that they can be integrated with specific skills, aimed at the resolution of contingent tasks and design and soft skills. To be transferred to all situations, multiple and differentiated, which require the ability to combine their experience and knowledge already possessed and to continue to integrate them with new, lifelong skills, in order to interpret and deal with different problems, to translate the consolidated skills in operational mode and management and, consequently, to be able to make relevant and congruent decisions.

The guidance of the older must be based on self-guidance, in turn supported by the acquisition of knowhow, able to develop a wealth of flexible skills, transferable, but also specific, capable, that is, of responding with tools and content tailored to the demands that the social and working world requires. Like the ability to enhance their work experience, they acquire new technical and professional skills, learn techniques for autonomous research work which also connects the ability to maximise the opportunities that new technologies offer.

Mature skills in the perspective of an older approach, then, are to actively participate in the construction of knowledge/skills; be open to all stresses, activate all available resources, both internal and external, arrange positively to face novelty and hone new cognitive and emotional tools, operating to face and manage the unprecedented, but also reorganise old tools to find new solutions.

Third Age European Perspective: Which Policies?

Alessandro Figus

5.1

European Union and Third-Age Policies: General Issues

Today in the European Union the discussion on the conciliation between the social and the economic is inclined to focus on the possible assets of a monetary union beyond the Treaty of Maastricht and beyond the introduction of the Euro, but also and principally after “Brexit”, on union on national social protection systems. At the same time the development of a monetary union is going in relation to the economic system and the labour market. The European crisis highlights the undermining of social spending as a result of a stronger fiscal discipline, therefore we have more flexibility in the labour market and groups of population are damaged, certainly the young, but also the elderly.

The new instruments of economic governance adopted to tackle the crisis (for example we can turn around the question posed by the Treaty on Stability), a policy that to the exclusion the old generation (employment and labour markets, the composition of the workforce) with the economic consequences of ageing are associated with the higher cost of the society to support the elderly population. The European Union cannot be built only on business and economy; man also has feelings. Politics cannot cancel morals (a matter of social survival) and we must not forget what Nelson Mandela says, «Education is the most powerful weapon that you can use to change the world». In our case we will talk about education for all including also education for seniors and senior students should be encouraged to be involved in more than only their studies, in order to become active and responsible students and citizens to change the education world. In reality this could involve a very wide range of activities that would hold benefits for the senior students themselves and for the institutions. The policies of third-age education have deep roots in Europe, since the Open University in England that was founded in the distant 1969.

It was open to all ages and all educational levels. Later in 1972, the French universities created their continuing education centres, initiated by legislation and called “Universités du troisième âge” – later called “tous âges” and “du temps libre”. Classes then started in French universities. In Germany, new universities have been founded and in some German states internal departments have been installed.

It is interesting to note that the group who took advantage of higher education as well as those who initiated the opening of the universities launched the movement precisely in the wake of the reform impulse of life-long learning. They orientated themselves already on a more extended notion of studying beyond mere professional training and the relationship is fundamental between the labour market and their requirement that Higher Education (HE) needs to understand and manage over age.

In fact, we know that getting old is a goal and a challenge for 21st century society. In particular, in the European Union, in recent years people have, on average, gained some years of life expectancy. Europeans are living longer than ever before because of medical advances but also because of improved standards of living. This is only one aspect, in fact the European Union is facing extraordinary changes in its demographic future and most concern not only an ageing population, but also growing life expectancy and immigrant flows.

An ageing population creates problems for society, the first being that of the traditional welfare-based pay system. A young man working supports an old person who has retired. In this context we must not forget that the elderly cannot become an “unused resource”. Putting the elders out of society means creating problems for the social system. Government policies must consider all this. Improved conditions of life imply a new management of the social and sanitary system of the EU; the elderly are better educated and have better functional capacity compared with the previous generation of over 65s, they are used to having an active life and participation. EU governments and their policies must consider this situation; they have to understand and govern it (Kleinman, 2002).

5.2

65 Years Old or Up?

At the moment the average life expectancy in Italy is over 65 but we have differences between men and women. In fact, for men it is 77 years, while

women reach up to 83. One Italian out of four is over 65 and one out of 20 is over 80. Following the European Union data, the age profile of the EU is expected to change dramatically in the coming decades, according to the EU's latest Ageing report that has been published and where it is possible to understand clearly that the population of the EU will be slightly higher in 2060 at 517 million, up from 502 million in the year 2010 and this is the result of an analysis done in the year 2010, that does not include the new changes in European society and sustained immigration flows.

Therefore, more recently the age structure of the European Union population is projected to dramatically change in the coming decades due to the dynamics of fertility, life expectancy and migration rates. The overall size of the population is projected to not only be larger by 2060, but also much older than it is now. The EU population is expected to increase by almost 4% (from 507 million in 2013) up to 2050, when it will peak (at 526 million) and will thereafter decline slowly (to 523 million in 2060).

No one knows for sure now how people will move to Europe in the coming years. In any case notably, the share of those aged 15-64 is projected to decline from 67% to 56% by 2060. The share of those aged 65 and over is projected to rise from 17% to 30%. As a consequence, the EU would move from having four people of working-age for each person aged over 65 years to about two people of working-age. Still following the EU indication in 2013, the member states with the largest population were: Germany (81 million – MM), France (66 MM), the United Kingdom (64 MM), Italy (60 MM) and Spain (47 MM) (European Commission, 2014). According to Eurostat's EUROPOP projections, the UK will become the most populous EU country in 2060 (80 million), followed by France (76 MM), Germany (71 MM), Italy (66 MM) and Spain (46 MM). EU-28 (or today EU-27) is becoming older, and that is because of increasing life expectancy and low levels of fertility sustained for decades, perhaps immigration will reduce this gap. In the Eurostat statistics the population projections show that the ageing process will continue in future decades. Some EU countries are better off than others, for example Ireland had the largest proportion of 0-19 years old and Germany the smallest, but in any case, in the European Union it is a problem today and will have a strong influence on inter-generational relations.

At the same time, the population will be much older. While longer lives are a major achievement of European societies, the ageing of the population also poses significant challenges for their economies and welfare systems. In this context, it is obvious to speak about a reform of HE, that is the University should be excluded to segments of the population other

than the traditional ones. It has responded to the educational needs of its ageing population with the development of its version of the University of the Third Age and particularly beyond; even the limit of 65 is to be brought into question.

5.3 Economic Consequences

If we analyse the repercussions and European public policy, we can understand that firstly there will be important economic consequences in the future with the total number of workers projected to decline over the forecast horizon to 195.6 million in 2060. The decline in the workforce will act as a drag on growth and per capita income, with a consequent declining trend in potential growth. Moreover, the demographic changes are expected to have substantial consequences on public finances in the EU.

On the basis of current policies, age-related public expenditures (pensions, health-care and long-term care) are projected to increase by 4.1 percentage points to around 29% of GDP between 2010 and 2060. Public pension expenditure alone is projected to rise by 1.5 percentage points to nearly 13% of GDP by 2060. Do you understand what kind of problem we have?

The problem is that Europe is faced with the risk of the sustainability of the current model, rightful and universalistic, of caring and health and social care. Practically today in Europe the older population is the playing field on which we will have to measure the European “welfare state”. This is palpable when we look at all indicators: health, social security and demographic. We need public European policies, but we do not have them; we in Europe are too busy with the “macro economy”, so small things escape, strategies are jumping, as a consequence “our elite” do not follow a common governance, unfortunately. We also need public European policies to consider that today society has increased longevity resulting in the great majority of older people in Europe spending many healthy, active, and potentially self-fulfilling years in the Third Age. The need to use their experience and education is crucial for many older people (pensioners or not) who strive for expression and learning.

However, the EU report shows a large diversity across EU member states, depending notably on progress with pension reforms. All in all, further progress towards sustainable public finances remains a major challenge. The results of the report prepared by the European Com-

mission services (European Commission, 2015) and the Ageing Working Group (AWG) of the EU Economic Policy Committee reveal that in some countries, there is a need to take due account of future increases in government expenditure, including modernisation of social expenditure systems. In other countries, policy actions have been taken, significantly limiting the future increase in government expenditure.

Another problem is the extent and speed of ageing depend on future life expectancy, fertility and migration. Life expectancy at birth is projected to increase from 76.7 years in 2010 to 84.6 in 2060 for males and from 82.5 to 89.1 for females. The fertility rate in the EU is projected to climb modestly from 1.59 births per woman in 2010 to 1.71 in 2060. Cumulated net migration to the EU is projected to be about 60 million until 2060. Ever greater life expectancies and a reduction of the fertility rate have had the consequence of a progressive ageing of people all over Europe. This demographic scenario has deeply affected labour policies in European countries, so that the prolonging of working life has become one of the objectives to achieve the target established by the European Council in Lisbon: an employment rate of 70%, by 2010 and tending to grow, in all EU countries (Eurostat, 2016).

In this European situation, the participation of older workers in the European labour market, by examining the characteristics and trends of the European scenario and all the initiatives that each country has promoted, at national level, to realise the European guidelines to enhance old workers' employment. The new labour market vision is characterised by major changes and this also affects the new working conditions and the age of the workers themselves, but it is not related to a specific age but to a period in one's life (in this case the third age) after the second age of full-time employment and parental responsibility. Furthermore, this includes people who are working part-time. The age is not the most discriminating especially when you have the strength to retrain through adequate educational process and in this sense, it could turn to third-age education. The problem from educational or social becomes political.

The problem is to create governance, public policies suitable and correct for a labour market that has not only young but also very active seniors, where the European senior's quality of life reveals that it is not only important to ensure active ageing, but also to have a dignified participation in modern society, especially in comparison with European welfare and with the European Social system where public policies especially in the labour market are neutral with respect to age in order to maintain, as long

as possible, people in a position to make a contribution to society removing age barriers such as for example loneliness.

Loneliness has a psychological element which affects people's approach to their life and has significant influence on their behaviour. Seniors often tend to express negative feelings and the feeling of being lonely, which is a result of the combination of the ageing process and social stereotypes, both influencing their quality of life. Consequently, loneliness is considered a critical indicator in estimating the quality of life and vice versa. We are going into private aspects, the psychological life of citizens. Now the point is: do they have to deal with public policy strategies that take into account the psychological influences of the citizens?

Must the priority of governments be oriented only by workplace policies or must governments consider citizens and increase their quality of life? All this is very complex, difficult to implement and, above all costs a lot. Finally, the problem is also generational and a matter of modernisation of skills.

How can older people adapt their skills to changes in society and how can governments build this integration process? Public policies must be implemented through educational projects, by understanding the labour market, the process must be deep, training is a solution, the training (educational process) must be dedicated to the adjustment of skills and not as use of time. I will explain better, it is not only a problem that retired people should return to school to learn how to work with modern systems.

The problem is to retrain according to the needs of society. In 2003, during a conference on "Education Quality" organised in May by the Technical University of Novosibirsk, precisely in Novosibirsk (Russian Federation), in the framework of the conference financed by the World Bank for Reconstruction, my intervention was dedicated to the importance of the relationship between the labour market and the "Academic World", a necessary effort to understand the effects of globalisation on the labour market. In fact, sustainable development is the greatest challenge to the university world during the time of globalisation involving the labour market.

We would like to come back to the people, their qualitative effectiveness is the result of the "higher education product" and depends conclusively on the "performances" of the human components of the teacher, in the first place, and then of the students (Van Weenen, 2000).

Economic and cultural growth and the ability to renew are the fundamental objectives of every country and they should be also for countries in development and transition, in particular the European Eastern

countries. An important contribution to the attainment of such an objective could be brought by a suitable higher education quality that aims for the development of creativity and individual initiative, as well as to the acquisition of competences that improve the professional qualifications of the teaching staff.

5.4

Perspectives in a Time of Globalisation

In contrast to the past, today in a time of globalisation, the competitive advantage of a country is founded more and more on the wealth of human resources and less on the value of materials, capital and technologies. Such challenges have to be answered by the quality of higher education in order to satisfy individual cultural needs, and the needs of insertion in the world of work, with the main objective of favouring the partnership between individuals, businesses, interest-based organisations, and in our case, favouring sustainable partnership enterprises – the academic world, the University world.

For students, and in our case senior students, third-age students, it is not only important to attain a good cultural level from both a qualitative point of view with respect to content, but also to acquire a “higher education with a strongly practical character”, as underlined by the various resolutions of the Council of the European Community and first among all that of 5th December 1994 (one very close to the reality in continuous evolution of the labour market), to coming into contact with the world of work.

For such a purpose, one ascertains that in the European economic world there are prefigured forms of organisation – very different from traditional and hierarchical ones, because today these are characterised by integration and strongly oriented to communication, and we remark today, in a time of globalisation, that we have not a great difference between that Europe and other parts of the world.

The centre of the discussion is the relationship between the labour market and citizens and in the citizens, we must also include all those who are ageing, but in reality, are still active. The training will give a redevelopment to do certain activities, putting out of work some age groups means automatically creating new problems that in turn, as we have already said in a psychological sense, will mean the population still potentially active in

the population at risk of exclusion and loneliness, a population that may be waxing tensions and social problems. The risk exists.

The question is not how older people are busy with training projects but whether this training is adequate to continue their work in a modern labour market. Moreover, it seems quite difficult to access professional updating courses, owing to their low profitability, on account of establishments, of investments in courses geared to workers close to retirement, together with the real difficulties to adapt to new technologies on account of old workers. The improvement of the work setting, the introduction of flexible schedules to make the progressive passage to retirement easier, the reduction of difficulties to access training courses, the elimination of discrimination due to age; all of these represent some initiatives promoted by EU countries to implement senior employment.

We need to understand the aspects that support good psychological ageing as well as the facts that threaten it. They have to be aware that there are a lot of preconceptions and false assumptions regarding all dimensions of the ageing process and aged people. Of course, we cannot forget the health risk, but we also think that the efficient part of this segment of the population has to find new ideas to integrate into the labour market and can make a contribution and receive benefits that help society itself.

We must design a new way of working in relation to age, as a normal factor and not of exclusion or special effect. New jobs are to be modelled in order to involve the populations of the elderly, but not only as an end to occupy time. The life expectancy of seniors is constantly increasing. The average life expectancy in EU member states for the coming years is increasing, keeping active means reducing social problems and therefore the costs to society.

The effort that government policies should be focused on, however, is a new governance of the senior population. It seems clear what I mean. If the training process becomes central, as well as the labour market, "education" cannot only be that which is constructed with the aim of occupying the time of seniors. Over 65 does not mean anything of course.

It is indispensable to verify the state of health but also in the European Union state pensions are often too small to allow a decent living and many older citizens depend on their families and friends for support. Anyone who is able to work has to find a conversion of professionalism, his/her powers can be of help to young people, or they may be engaged in activities that young people are not interested in doing. What I mean is that we cannot exclude segments of the population, excluding the effect of non-use of the baggage of experiences, perhaps modernised training for example, to

consider using new technologies. It is evident that policy action has been on old-age pension reform but, as stressed, a more comprehensive set of reforms may be necessary to encourage work at an older age and the reforms must focus on a common European model that takes into account the reward for work and the global change in employment practices, but also the need to improve the employability of workers. Practically we need to understand the labour market and at the same time understand that European society is ageing, the only way to identify the right key policies.

Older people should not be considered a homogeneous group. Indeed, this section of society can be characterised by its heterogeneity. Many are fit and active, but the problem is that to park seniors excluding them from active life brings more serious social problems than their active involvement.

Then again, many older people in the European Union are already actively involved in productive life far beyond the official age of retirement, in various types of voluntary and non-remunerated work. Others contribute to easing the workload of their families by taking care of daily housework. It is also very common for older people to take on an important role in the education of their grandchildren. Where older adults are involved in education programmes, the experience has been positive.

Older people possess a range of learning skills from prior experience, and they are no less active and motivated learners than younger people. Studies on learning capacity have shown no major decline in learning capacity before the age of 75. We need to understand which opportunity we have and which public strategy we can carry out, because especially in the European Union the result is a general improvement of old worker's employment levels due to the introduction of specific measures to enhance active ageing. From the "Noughties", in fact, no EU country has recorded employment reductions for this age target, whereas the whole of the EU has observed a clear employment increase.

Today, practically in all Europe, the problem is the progressive passage to retirement, the reduction of difficulties to access training courses. The EU government and the European Union Commission are working to understand which policies we need. Often there is an incredible distance between institutions. The education system does not adapt to the needs of society that is rapidly changing and often forgets the ageing process.

Today university-oriented education for older people has to be seen as a form where general societal developments appear. The opening of European universities for older learners, or to say it the other way around, older people appearing as students in university classes has its basis in the follow-

ing societal facts as we have seen before, the question related to the demographic factor of an increasingly older population is present in all of us: we are all growing older. However, today the time horizon has completely changed, not only because of longer life expectancy, but also due to earlier retirement practices, structural economic changes with fewer possibilities for paid work, and the gradual emergence of an older generation that has achieved a lot during their working lives.

They commonly worked more than 30/36 working hours per week and the market demands to rebuild the economy and society. Many of them already sense that this central value is totally altered for younger generations and particularly immigrants at the very moment when they, as individuals, leave paid work as pensioners. Many of them know that a new global orientation in this prolonged time horizon is possible and necessary and should be given a chance, retirement does not become a target for their life perspective, in their quality of life.

In this case, it is important for all to have new policies and to have governance of these new demographic tendencies which coincided exactly with when a progressive educational policy started during recent years. European education has come to be considered as a European citizen's right as a *lifelong learning* strategy and it is setting out towards the educated society. It is also a question of mobilising the reserves of talents in society, this has turned out to have an impact for all, including European women and older adults.

It is interesting to note that the group who took advantage of higher education as well as those who initiated the opening of the universities launched the movement precisely in the wake of the reform impulse of lifelong learning. They orientated themselves already to a more extended notion of studying beyond mere professional training, although this is not the same across Europe. If we take for example Germany, we are faced with dissimilar results, diverse factors of our society and not only for economic reasons affect education. In the future in Germany more than 5 million people will want to attend university classes in their leisure time, older people over sixty have today enrolled in German universities, are at the moment an active part of the educational system, and this still does not concern only Germany practically in as much Europe, including Italy.

When older people started to attend university classes and when faculty tried to create structures for them, a backward orientated ageism had to be faced. Ageism is present in the whole of society and is persistent. The critics claim that teaching during the whole life cycle is initiated only in the interest of creating jobs for the young. Another ageist attitude claims that

universities are too full at the moment and it is clear what we want to acquire is the spiritual process through which a person, whatever his/her age, can become productive (Costa, 1994).

In the future the proportion of elderly people in the European Union is set to rise fast while the proportion of working-age people will fall significantly and the demographic transition is viewed as one of the biggest challenges facing the EU.

Europe is getting older and the conclusive question is, "What is it possible to do?". EU public policies should be directed to understanding that older people also play an active role in communal and societal affairs. In fact, they engage in a variety of tasks and new activities, playing a crucial role in local decision-making processes and holding important responsibilities as members of local committees which address development issues. The EU governments necessities are to help the elderly.

They are reminded not to stay all day sitting on a chair, but to go to work as long as they can, to volunteer, to do exercise, do training, care for children and grandchildren. Let's see how we are placed compared to other European countries and what the active ageing policies are for example in Italy and in Germany, where the populations are currently the EU's oldest, here we will age rapidly for the coming years, then stabilise. Some populations are still currently younger, mainly in the East of the EU, but they will undergo ageing at increasing speed and by 2060 will have the oldest populations in the EU.

We must look beyond; retirement means freedom and enjoyment at the same time, but with the improvement of the leisure society we can turn to a very modern concept. But from their own experiences, older people know that leisure does not automatically result in fulfilment. We know from experience that older students assist in various projects and activities for the younger generation in a direct transfer of experiences, especially those accumulated from a professional point of view. It is also a matter of how to be interactive, and how young students participate in activities of third-age education.

Some EU research shows that social integration is very important for the happiness of dependent elderly persons living at home: social activities and contacts improve their happiness, because the common EU strategy is to have a vision behind the active ageing approach in a society for all ages, in which are they valued and where all have the chance of participation and involvement, without relation with their age and where people should have opportunities to contribute in a variety of ways with institutional sup-

port. The main goal may be the creation of an inclusive society and this can further economic sustainability.

The feeling is that certainly to stay active and to have responsibilities probably helps to improve the ageing process, but it is only a justification for the political and economic failure. In Europe, we have a policy, an idea that giving older people better work incentives and choices is crucial in the context of rapid population ageing and pressures on the sustainability of public social expenditures. In conclusion it is evident that we need to encourage greater labour market participation at an older age by fostering employability, job mobility and labour demand.

It will be a good strategy, a good European policy. Europe and all EU members (in particular in Italy) are required to carry out a series of reforms to encourage longer working lives and to reply to the looming challenges of speedy ageing population (Sonnet, Olsen, Manfredi). For example, in Italy working longer is a public stratagem where the state saves on pensions, like being a volunteer, in this case public and private organisations save on staff costs, or taking care of children and grandchildren, so they cover the deficiencies of family policies where these do not exist. Practically active ageing in Italy (but also in Europe, including Switzerland or Norway) is an “optimisation process”, of course, and not just for the elderly. European policies must then change trend and be uniform and evenly distributed throughout Europe. What can the EU policy do? For example, carry out incentives or promote the employability of workers with the working lives system, to reinforce employment chances at an older age and to reduce barriers (age discrimination). We would like to reduce the social problem, for EU society, it is important that workers build up longer careers and continue working at an older age.

In conclusion there is thus the need to recognise the creative potential of older citizens, their capacity to learn and to engage in new activities, their enthusiasm and their willingness to contribute to improving their quality of life. We understand that intergenerational communication is fundamental; first to improve knowledge by young people of the traditions, the cultural system, of what we call “having been passed along from generation to generation”. This is achieved primarily through developing relationships between the elderly and the young and can be beneficial for the wellbeing of both parties, indeed it consists of or is derived from tradition. There are very positive forces in the community. It depends very much on the cultural level.

The secret is common participation, old and young together, in the same way, both instruments of progress of the same family, of the same society. We need special working arrangements. For example, we need to involve (inclusion) older workers again in the labour market to continue employment, but in a less intensive manner, perhaps on a part-time basis, or in self-employment. Modern technology has increased the possibilities of working from home.

Special working arrangements can thus be an important vehicle for the employment of older people. The problem is to have full recognition. Many in Europe have never retired and contribute to the development of the labour market and of society until the end.

Ageing: Which Future Opportunities. Geopolitical Aspects of EU Financing

Diana Spulber

6.1

Introduction

Today we are witnesses of a demographic revolution. The upsetting of demographic classes is beginning to be a crucial question for future reforms in political, social and medical fields. The decreasing of nativity and increasing of longevity are creating an imbalance in society. Because of this unbalanced situation researchers are starting to think about ageing, how to improve the quality of life, how to make ageing people an active part of society. As we will see later, the idea of the collapsing of the welfare system, of health care and in particular of the long-term system of pension schemes and in the meantime the economic crisis, the decrease of economic power and increasing of social and demographic inequalities are stressing political bodies to find an urgent solution. Despite criticism of the social system for the quality of life that is too “welfare”, we can also talk about active ageing people as they were called by van Dyk and Lessenich (2009), “new elderly” or potentially active citizens that can still be useful for the family and for the society at large. Despite ageing being seen and studied as a natural process of decline, as a passive period of life, as an involution, the plasticity/activity in later life has started to be popular for almost 25 years. In 1998, Rowe and Khan wrote about “successful ageing”. We can also notice how the health care system is switching from a more curative to a preventive model focused especially on prevention of mental and physical diseases.

If we analyse the evolution of the concept of active ageing, we can argue that the main idea that older people are able to have a life that is self-sufficient, then they are not a social problem, but also able to contribute actively to the public good. This idea can also be found in several public documents of the European Union.

6.2

Historical Approach

The examination of all official documents regarding the elderly leads us to say that the evolution of the “ageing people question” can be subdivided in 2 periods: before 1990 and after 1990.

The period up to 1990 can be seen as a period in which scarce attention was paid to the questions about the elderly, this stage is characterised by more economical and social impact on third-age people but nothing regarding quality of life or wellbeing of retired people. The notion of retired people is used appropriately here as till 1990 the “ageing people question” was treated as pensioner’s period of retirement and all other questions were linked to retirement and retirement policy, so we can assert that before 1990 ageing was seen as “non-workers” or “retired”.

To argue the affirmation above the most important law documents are cited:

a) 1980-1990

- 18 February 1982: European Parliament adopted the resolution on the situation and problems of the aged in the European Community.
- 10 March 1986: European Parliament adopted the resolution on services for the elderly.
- 14 May 1986: European Parliament adopted the resolution about the measures to improve the situation of old people.
- 8 December 1989: Declaration of European Council of Strasbourg on Fundamental Social Rights of Workers: this declaration has 2 articles dedicated to the older (article 24 and article 25) but as retired people with the right to have a decent standard of living.

b) After 1990

- 24 April 1990: with the official document of EU Commission on Communications on the Elderly was set out the basis of interest in ageing.
- 26 November 1990: EU Council adopted its decision on Community actions for the elderly.
- 17 October 1991: EU Commission Decision on the Liaison Group on the Elderly where article 1 states that «It shall be possible for the Commission to consult the Group on all areas relating to the protection of the interests of the elderly».
- 27 July 1994: Adoption of “White Paper European Social Policy” «a Decision for further Union-wide actions to help meet the challenges of

an ageing population covering, in particular, the role and contribution of the active retired population».

- 8-12 April 2002: European Parliament resolution on the Second United Nations World Assembly on Ageing.

- 9 July 2008: Decision of the European Parliament and of the Council on the Community's participation in a research and development programme undertaken by several member states aimed at enhancing the quality of life of older people through the use of new information and communication technologies.

- 7 September 2010: European Parliament resolution on the role of women in an ageing society.

- 14 September 2011: Decision of the European Parliament and of the Council on the European Year for Active Ageing and Solidarity between Generations (2012).

- 6 December 2012: The Council of the European Union adopted the Guiding Principles for Active Ageing and Solidarity between Generations, which should serve as a checklist for national authorities and other stakeholders on what needs to be done to promote active ageing beyond the European Year 2012.

- 6 February 2013: European Parliament resolution on the European Innovation Partnership on Active and Healthy Ageing.

c) In the meantime, at international level other important steps have been taken:

- 26 July: 2 August 1982 Vienna International Plan of Action on Ageing was one of the international instruments on ageing, through its 62 recommendations it put the basis on guiding thinking and the formulation of policies and programmes on ageing.

- 14 December 1990: The United Nations General Assembly voted to establish October 1 as the International Day of Older Persons as recorded in Resolution 45/106.

- April 2002: The Madrid International Plan of Action on Ageing and the Political Declaration, adopted at the Second World Assembly on Ageing, marks a turning point in how the world addresses the key challenge of “building a society for all ages”.

The Madrid Plan of Action offers a bold new agenda for handling the issue of ageing in the 21st century. It focuses on three priority areas: older persons and development; advancing health and well-being into old age; and ensuring enabling and supportive environments.

6.3 Challenges

As several times mentioned the percentage of elderly people is rapidly increasing, due to low birth rates, “baby-boomers” ageing and increased life expectancy.

As we can see from figure 1, according to the Eurostat data the number of people over 65 will grow from 17.4% to 29.5% of the total population between 2010 and 2060 and in addition the number of people over 80 will nearly triple to 12%. This fact means that the number of retired people will be around 30% of the entire population. If we check the figure in 2050, non-working people will be around 43.1%.

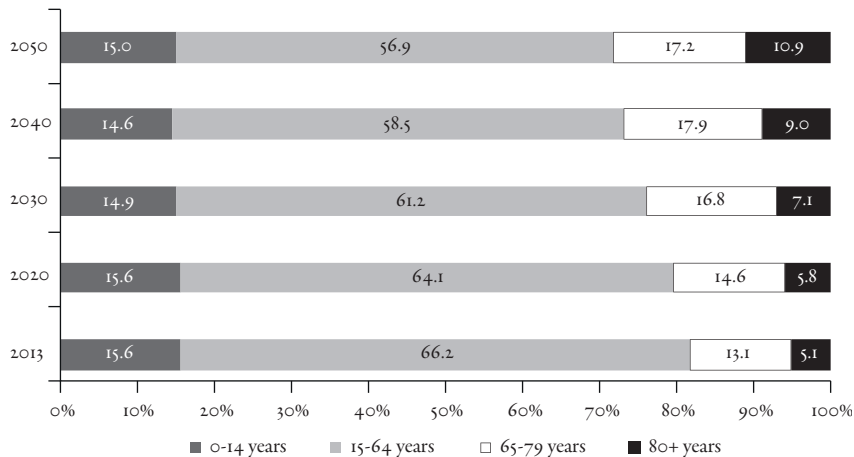
We can say that during the same time, the working-age population in the EU is expected to decline by 14.2%. This fact takes the EU to a collapse of the social welfare system.

Pensions, health care and long-term care systems risk becoming unsustainable, with a shrinking labour force no longer able to provide for the needs of the growing number of older people.

Population ageing raises three fundamental questions for policy-makers.

1. Will the increased number of older people bankrupt our health care and social security systems?

FIGURE 6.1
Population structure by major age groups, EU-28, 2013-2050



Source: EUROSTAT.

2. Will people remain self-sufficient and active as they age? As people are living longer, does it mean that they will be more disabled or not self-sufficient?
3. And the last but not least important question is: Who will pay? How do we best balance the role of the family and the state to care for people who need more health care and more assistance, as they grow older?

6.4

European Union Solutions

The several resolutions made by the EU Council and EU parliament (some of them were cited above) can be read as an indicator of the importance of the “ageing question”. The European Commission must find a solution to avoid the collapse of the EU social system. For this purpose, the European Commission is not only a facilitator in promoting the exchange of knowledge in the field of ageing but also a financing body. The support from the EU is done in terms of financial assistance to the activities that are selected as priorities to the projects that respect the established criteria and consequently through the dissemination of information and the results that derive from studies. The European Commission, by financing, responds to national initiatives that come from EU countries. The EU Commission plays a role of facilitator and promoter of knowledge in the field of ageing. The financial support is given in two ways: direct and indirect financing.

Indirect financing funds: the relationship with the European Commission, is indirect, i.e. mediated through authorities, state, regional and local, the financing is paid to the national governments.

Direct financing funds: the relationship is established directly with the European Commission: the financing arrives directly to grant-holder for ex to university.

The funds are managed according to strict standards to ensure that their usage is subject to tight controls and that they are spent in a transparent and accountable way. EU funding is complex: there are many different types of programmes managed by different bodies.

More than 2/3 of the EU budget is managed by member countries. To argue what we said before, we can cite some EU funding sources and instruments that can be relevant for the promotion of an active and healthy ageing project with respective allocated sums for 2014-2020:

- Active and Assisted Living Joint Programme (AAL): €700 million.
- Employment and Social Innovation Programme (EaSI): €919,469 million.
- European Institute of Innovation and Technology (EIT): €2.7 million.
- European Structural and Investment Funds (ESIF): €454 billion.
- Health Programme: €449.4 million.
- Horizon 2020: nearly €80 billion.
- Innovative Medicines Initiative (IMI): €3.3 billion.
- More Years, Better Lives Joint Programme (MYBL): €7.78 million.
- Neurodegenerative Diseases Joint Programme (JPND) (2015-2017): €30 million.

Another financing instrument, that is not directly linked with active ageing, is Erasmus plus.

As we can see the most important financing instruments are European Structural and Investment Funds and Horizon 2020. For this reason, we will analyse shortly only these 2 instruments.

With a budget of €454 billion for 2014-2020, the European Structural and Investment Funds (ESIFs) are an example of Indirect Financing Funds and are one of the main European Union investment policy tools

By 2023, the ESIFs will deliver a critical mass of investment oriented mostly to EU priority areas, to respond to the needs of the real economy by supporting job creation and by getting the European economy growing again in a sustainable way. If we check how this financing instrument is used for Active Ageing promotion, we can say that few countries are using the financing in this field. This fact is found despite the fact that article 5.5 of *Regulation (EU) No 1303/2013 of the European Parliament and of the Council* of 17 December 2013 states that «Member States shall make use of the ESI Funds, in line with relevant national or regional strategies, where such strategies are in place, to tackle demographic problems and to create growth linked to an ageing society».

As we can see in TAB. 6.1, the countries received from 140 million (Luxembourg) euros to 86 billion (Poland). The other countries that received quite a large sum are Italy, Spain and Romania.

From FIG. 6.2 we can state that only seven countries are investing in Active Ageing, these countries are Austria, Croatia, France, Italy, the Netherlands, Poland and Slovenia. The decision to invest in Active Ageing does not depend on allocated country amount, for example

6. AGEING: WHICH FUTURE OPPORTUNITIES

TABLE 6.1
Using Structural Social Funds for Active Ageing

	Country	Healthy life expectancy of males/females in years	Financial allocations Active Ageing (107)	Allocated funds from ESIF (billions)
1	Austria	78.4 / 83.6	€ 23,700,000	4.92
2	Belgium	77.8 / 83.1	0	2.71
3	Bulgaria	70.9 / 77.9	0	9.88
4	Croatia	73.9 / 80.6	€ 23,700,000	10.74
5	Cyprus	78.9 / 83.4	n/a	0.874
6	Czech Republic	75.1 / 81.2	n/a	24.2
7	Denmark	78.1 / 82.1	n/a	1.25
8	Estonia	71.4 / 81.5	n/a	4.46
9	Finland	77.7 / 83.7	n/a	3.76
10	France	78.7 / 85.4	€ 37,795,071	26.73
11	Germany	78.6 / 83.3	n/a	27.87
12	Greece	78 / 83.4	n/a	20.38
13	Hungary	71.6 / 78.7	n/a	25
14	Ireland	78.7 / 83.2	n/a	3.36
15	Italy	79.8 / 84.8	€ 6,920,159	42.77
16	Latvia	68.9 / 78.9	n/a	8.39
17	Lithuania	68.4 / 79.6	n/a	5.63
18	Luxembourg	79.1 / 83.8	n/a	0.140
19	Malta	78.6 / 83	n/a	0.828
20	Netherlands	79.3 / 83	€ 101,000,000	1.72
21	Poland	72.7 / 81.1	€ 329,017,128	86
22	Portugal	77.3 / 83.6	n/a	25.79
23	Romania	71 / 78.1	n/a	30.84
24	Slovakia	72.5 / 79.9	n/a	15.32
25	Slovenia	77.1 / 83.3	€ 34,480,625	3.87
26	Spain	79.5 / 85.2	n/a	37.4
27	Sweden	79.9 / 83.6	n/a	3.65

Source: EUROSTAT, Mapping of the Used European Structural and Investment Funds 2014-2020 and European Structural and Investment Funds: factsheets. Table made by author.

FIGURE 6.2

Countries that used the European Structural and Investment Funds for Active Ageing



Source: elaborated by the author.

Romania (30.84 billion) will receive a larger amount than France (26.73 billion), and even France's decision to invest in Active Ageing, does not depend on healthy life expectancy of males/females in years, as we can see that almost all countries have the same life expectancy level with the exception of Latvia and Lithuania. We can state that it depends purely on a National Political Decision.

6.5 Horizon 2020

Horizon 2020 is the largest EU Research and Innovation programme with nearly €80 billion of funding available over 7 years (2014 to 2020) – in addition to the private investment that this money will attract, it promises more breakthroughs, discoveries and world-firsts by taking great ideas from the lab to the market.

6. AGEING: WHICH FUTURE OPPORTUNITIES

TABLE 6.2
Examples of projects financed

Title Acronym Funding programme	Project objectives	Coordinator Country	EU contribution €
Mobilising the potential of active ageing in Europe MOPACT FP7-SSH	MOPACT is a four-year project to provide the research and practical evidence upon which Europe can begin to make longevity an asset for social and economic development. To achieve this aim MOPACT concentrates the highest possible quality of scientific analyses into the development of innovative policies and approaches that can assist public authorities and other key actors, at all levels in Europe.	United Kingdom	975,901
Assessment of hearing in the elderly: ageing and degeneration – integration through immediate intervention. AHEAD FP7-HEALTH	Project AHEAD III has been specifically designed to: – Provide evidence of the effects of hearing impairment in adults and particularly in the elderly – Analyse costs associated with the implementation of integrated large-scale programmes of hearing screening and intervention in the elderly – Provide quality standards and minimum requirements for screening methods and related diagnostic techniques – Develop guidelines and recommendations on how to implement successful screening programmes to be tuned to the local, social, and economic conditions of a country.	Italy	538,226.87
VitaminD3-Omega3-Home Exercise-Healthy Ageing and Longevity Trial FP7-HEALTH	Research on therapeutic interventions that are effective, affordable and well-tolerated in the prevention of chronic disease are urgently needed and will have an outstanding impact on public health as a whole. Among the most promising interventions that meet these requirements are vitamin D, marine omega-3 fatty acids and physical exercise. However, their individual and combined effects have yet to be confirmed in a clinical trial.	Switzerland	1,479,647.75

(continued)

TABLE 6.2 (*continued*)

Title Acronym Funding programme	Project objectives	Coordinator Country	EU contribution €
Managing active and healthy ageing with use of caring service robots MARIO H2020-EU.3.1. – SOCIETAL CHALLENGES – Health, demographic change and well-being	MARIO addresses the difficult challenges of loneliness, isolation and dementia in older persons through innovative and multi-faceted inventions delivered by service robots. The effects of these conditions are severe and life-limiting. They burden individuals and societal support systems. Human intervention is costly but the severity can be prevented and/or mitigated by simple changes in self-perception and brain stimulation mediated by robots.	Ireland	701,137.51
The continuum between healthy ageing and idiopathic Parkinson's Disease within a propagation perspective of inflammation and damage: the search for new diagnostic, prognostic and therapeutic targets PROPAG-AGE-ING H2020-EU.3.1.1. – Understanding health, wellbeing and disease	The main goal of PROPAG-AGE-ING is to identify specific cellular and molecular perturbations deviating from healthy ageing trajectories towards PD. To this aim the project will exploit four large, very informative EXISTING COHORTS where biomaterials are available: i) de novo PD patients (before any therapy) followed longitudinally, including the largest repository of PD patients, i.e. PPMI; ii) centenarians and their offspring (CO) who never showed clinical signs of motor disability; iii) old twins of the Swedish Twin Registry (STR) followed longitudinally for >45 years, assessed for lifestyle and exposure to toxicants, and where incident and prevalent cases of PD discordant twins have been collected, including brains.	Italy	5.993,376

Source: http://cordis.europa.eu/projects/result_it. Table elaborated by author.

6.5.1. HEALTH, DEMOGRAPHIC CHANGE AND WELLBEING

During the first four years of Horizon 2020 (Work Programmes for 2014/15 and 2016/17), the EU will invest more than €2 billion in this challenge; in calls for proposals or actions.

H2020 Work Programme

Responding to this challenge, research and innovation (R&I) under Horizon 2020 is an investment in better health for all. It aims to keep older people active and independent for longer and supports the development of new, safer and more effective interventions. R&I under Horizon 2020 also contributes to the sustainability of health and care systems (<https://ec.europa.eu/programmes/horizon2020/en/h2020-section/health-demographic-change-and-wellbeing>).

This priority is divided into different activities.

a) 1.4 Active ageing and self-management of health

- SCI-PM-12-2016: PCP – e-Health innovation in empowering the patient.
- SCI-PM-13-2016: PPI for deployment and scaling up of ICT solutions for active and healthy ageing.
- SCI-PM-14-2016: EU-Japan cooperation on Novel ICT Robotics-based solutions for active and healthy ageing at home or in care facilities.
- SCI-PM-15-2017: Personalised coaching for well-being and care of people as they age.

b) H2020 Work Programme

- SCI-HCO-16-2016: Standardisation needs in the field of ICT for Active and Healthy Ageing.
- SCI-HCO-17-2017: Support for large scale uptake of Digital Innovation for Active and Healthy Ageing.

To better understand how financing is functioning, a table is provided with projects financed (TAB. 6.2).

6.6

Conclusions

As was several times mentioned, the increase of numbers of elderly and, in the meantime, the expected decline by 14.2% of the working-age population in the EU is generating social upset. The demographic revolution

is creating a huge challenge not only for Europe but for all countries. The European Union is responding to this challenge through Policy, Law and Financing Instruments. Policy response is done: by creating different official committees like the Social Protection Committee, the Employment Committee that are in charge of “ageing questions”; by creating the European Innovation Partnership for Active and Healthy Ageing; by elaborating an Active Ageing Index. The law’s responses to this challenge are the different rules, decisions to regulate the action for promotion of active ageing and also to regulate the activities of different committees in the active ageing domain. Financing response is done through financing of different projects aimed to study: demographic evolution; health problems correlated with ageing; the role of ICT in Active Ageing promotion; the best practices in Active Ageing around the world. All the projects financed should serve as an incubator from where politics and EU country officials should get information in order to find the best political solution. The suggestions that can be provided are: more transparency on different national and EU government actions with the respective budget allocations is needed; an increase of mainstreaming between organisations that deal with ageing; more communication about best practices and sharing of results of research in the field of Active Ageing.

Some Aspects of Social Work with Older People

Irina Sikorskaya

7.1

Introduction

The numerous aspects and problems of social work with older people are currently in the focus of many social institutions, social and research programmes aimed at ensuring acceptable standards of living for the older population.

It is a well-known fact that a change of the social status of a person in older age is caused by the termination of employment, the transformation of values, changes in lifestyle and communication, as well as by emergence of various difficulties in social and psychological adaptation to the new conditions.

In that regard, frustration and lack of interest in an active social life, and in many cases loneliness, are considered as a serious impediment to healthy ageing. Studies show that all these characteristics mentioned are linked with being less physically active, as well as worse intellectual functioning.

Thus, they are important themes for both researchers and policymakers in terms of improving quality of life and physical health in old age. The great majority of current studies mainly focuses on individual-level determinants for “unhealthy” ageing. Studies have documented large variations in the prevalence of late-life frustration and loneliness across countries and geographical regions and the reason for a great deal of the variations is still unclear (Sollitto, 2013). Several theoretical explanations of contextual influences on the susceptibility for feeling frustrated or lonely have been put forth but only a few of the proposed contextual factors have been tested. All these aspects dictate the need to develop and implement specific approaches, forms and methods of social work with older people.

With a growing ageing population, it is crucial to gain insights into how societies can increase the number of healthy and more socially active years of life for older people. The importance of daily attention to the solution of social problems of this category of population is increasing due to the rise in the proportion of older people over the last decade throughout the world. The tendency of the older population's growth requires a radical change in social policy in respect of the most socially vulnerable categories of society in many countries. A great number of factors influence older people. Along with gender, age, health, education and income, social integration and social relations are associated with high levels of risk in later life. Recent studies have used a multidimensional concept of social capital including social networks, interpersonal trust, and reciprocity. Social capital consists of structural and cognitive components. The structural dimension contains extent and intensity of associational links or activity whereas the cognitive component covers perceptions of support, reciprocity and trust (Ermolina, 2016).

7.2

Social Work – International Experience

The dynamics of development of social work stimulates the mechanisms of improvement of the quality of life of older people, which results in the innovative potential of social work and reveals the tendencies towards change. Population ageing increases needs for welfare provision, while the pressures of globalisation on national economies restrict the capacity to finance expensive welfare policies in this field (<http://ifsw.org>). European countries have been facing the problem of bridging the gap between economic productivity and social support for some decades now, at least since the transformation of the countries of the post-soviet bloc to a market economy that increased globalisation and economic pressures on the welfare state. More than two decades after this transformation, a new generation has emerged that has been brought up in a globalised world led by economic principles whereas the older generation has been socialised in more or less comprehensive welfare states. This is especially evident in the post-socialist countries where the older generation was socialised in a regime where the state ensured a workplace for all its citizens and the younger generation has had completely different

experiences on the labour market and with the state than their parents' generation (Ghilarducci, 2008).

The majority of older people throughout the world need a wide range of services and care provided to them by family members, neighbours, medical, charitable and social organisations.

Social work is recognised widely as a manifestation of the human attitude towards an individual. Social work has been provided since time immemorial as a charity, religious commitment of a person, as a system of humanitarian services to an individual in need. It correlates completely to the care of older people. The UN formulated the major principles towards the ageing population: 1. independence, 2. participation, 3. care, 4. realisation of inner potential, 5. dignity (<http://www.scotland.gov.uk>). These principles are considered as a background of social policies towards older people in many European countries.

The first schools provided the training of social workers were established in Western Europe and USA at the end of the 19th century-beginning of the 20th century. The experience accumulated during the century is diverse and multidimensional. Today almost everywhere in the world one can find social workers.

In the world there are hundreds of higher education establishments on social work, not to mention numerous specialities of social workers at university level. There are nearly 500 higher education institutions in Europe providing professional training for social workers. In most cases this type of education is financed by the state, although there are many private schools as in France and Italy. In Spain, Portugal and in some countries of Latin America most of these schools belong to the Roman Catholic Church.

The majority of education establishments of this profile were opened in the 1960s, when social work developed intensely. At that time numerous national and international associations of social workers were formed and the thematic periodicals and specialised magazines were published. The International Code of Conduct for social workers was elaborated. In many research projects and studies we can find that social work received recognition of the academic community and wider society as an independent profession and independent academic discipline precisely at that time. The training of social workers reflects the peculiarities of national systems of education. Often there is no common pattern within one country. The importance of the International Association of Schools of Social Workers (IASSW) for social work education should be

pointed out here. One of its main functions is to assess the national programmes of education on social work. The Association cooperates fruitfully with the UN and International Organisation of Labour that acts as reference-information centre and database of the documentation related to the training of social workers.

Till the middle of the 1960s the general policy in the field of social workers' training was determined by the USA and Great Britain. Specialists from these countries were in high demand in Europe and widely invited to Europe to be engaged in the education process. Their knowledge and experience were greatly appreciated. In return, schools in Great Britain, America and Canada invited scholars from Europe for study tours or internships providing them with scholarships and other financial aid. By means of such exchange, the profession of social worker became internationalised, which helped to spread common standards of teaching and learning. Social workers require efficiency, initiative, and ingenuity in solving the specific needs of each older person. The interweaving of physical, psychogenic and psychological problems of older people is difficult to a certain extent, thus social workers need sufficient knowledge and special training to work with them.

Many older people can tackle difficult life decisions in a gradually complex, and largely commercial, care services market. This is where social work as a distinct discipline really comes into its own: the skill and ability to work with people to assess their needs within the context of the same factors affecting us all, whether lifestyle and history, family or community (Kubitskiy, 2010). It also involves tackling head-on the discrimination or sense of being overlooked that older people often feel.

Nowadays, there is a widespread trend that younger persons devote themselves to the care of older people and work with them. From this perspective, this is a meeting of different generations, respect for age of young employees, their tolerance of the established principles and beliefs of older people, their attitudes and values. Caring for older people will provide them with well-being to a certain extent. By well-being we mean a maintainable condition that allows an older individual to live actively, to develop and to succeed. It is the combination of feeling good and functioning well; the experience of positive emotions such as happiness and contentment as well as the development of one's potential, having some control over one's life, having a sense of purpose, and experiencing positive relationships (<http://www.socialwork.uw.edu>). Yet, well-being is a multi-dimensional construct, and cannot be adequately assessed in

this mode. The measurement of a population's well-being should therefore be a crucial point for all those engaged with policy, as it is often policy which can ultimately exert a critical influence on the lives and well-being of a population, and in particular, the economic crisis has regularly been considered for its impact on well-being (<http://www.endoflifecare.nhs.uk>).

Social work practice with older adults encompasses a broad range of functions. Whether working in micro or macro settings, the primary goal of the social worker is to address the specific challenges of the ageing process by promoting independence, autonomy and dignity in later life. As social workers we are powerful promoters with the knowledge, skills and values that really can change the lives of ageing individuals. Social workers in gerontology must be knowledgeable about unique legislation, policies and social programmes that affect older adults. In addition, they must be knowledgeable about the ageing process and the issues older adults and their care-givers face, adept at accessing resources for clients, and strong advocates who champion their rights.

7.3 Conclusions

The organisation of social work with the elderly must take into account the specifics of their social status, not only in general but also of each individual, their needs, wants, biological and social opportunities and other features of life. Caring for older people is a careful observation of others, the ability to enter into the world of their experiences with the simultaneous perception, and along with that to double-check their own feelings. This is the ability to perceive older people as they are. Caring for older people is a discreet, planned action in helping them in their adaptation process to the changed conditions of life (Ukrainian report on Social work with old people, 2016). Exceptional social work with older people requires it to be valued and visible. Practitioners should actively seek to work in this sphere. Older people and those who care about them should understand that social work is a service they could benefit from. Social workers are skilled in assessing and planning care needs from a complete perspective; in providing professional leadership for teams working around older people and their families; and in offering calm support at times of crisis, particularly when relationships may be

stressed. Social workers have the skills to help older people build on their strengths and, while this may help reduce social care needs, it may also benefit other areas. This could include older people supporting child-care or volunteering in the community to ensure that other care users are not isolated. Social work involves looking for creative solutions and overcoming discrimination to ensure that people can contribute.

The essence of social work with older people is in fact their social rehabilitation. In this case, the rehabilitation – is the restoration in their habitual duties, functions, activities, in the nature of relationships with people. The main thing for the social worker is the transformation of older people from the object (the client) of social work into subject.

Section II

Quality of Life and Lifelong Learning

Poverty, Health and Welfare: Snap-Shot on Elderly's Conditions in Sub-Saharan African Countries

Nicoletta Varani

I am old, I am poor, I am a woman and I'm alone!
(Mention of a Sudanese woman, pronounced on the occasion of
the 2nd World Assembly on Ageing, Madrid 2002)

8.1 The Framework

In Sub-Saharan Africa until the most recent past, the elderly were taken care of by the family and their experience of life gave them a privileged status of wisdom and dispensers of advice and life lessons.

In more recent times also in this geographical space, family ties have started to be more moderate, to loosen. The cause must be sought in the profound misery in which many African societies have fallen and therefore the misery urges one to seek a "future" in the cities leaving the villages and rural areas where many older people choose to remain abandoned to their own means, and thus become a burden, a social problem.

The population is getting older, but in Sub-Saharan Africa, despite the high proportion of young population, this phenomenon occurs much more rapidly than in other geographical areas of the Planet (Aboderin, Beard, 2015).

The statistics compiled from the last report of the United Nations (UN) *World Population Prospects. The 2017 Revision* compared to 2017, show that the number of persons aged 60 or above is expected to more than double by 2050 and to more than triple by 2100, rising from 962 million globally in 2017 to 2.1 billion in 2050 and 3.1 billion in 2100. Still on the basis of the report, although the African population will remain relatively young for several more decades, the percentage of its population aged 60 or over is expected to rise from 5% in 2017 to around 9% in 2050, and then to nearly 20% by the end of the century.

This demographic change will have profound implications for society, politics and the economy of countries of the Sub-Saharan region for which ageing is a major challenge as it increases the demand for a variety of health services, as a growing number of older people are living with chronic diseases and disabilities (see PAR. 8.3). However, little attention has been devoted to the problems of old age in Sub-Saharan Africa, which remains an area among the poorest in the world. Health and development in Sub-Saharan Africa find themselves in the objectives of the agendas of some declarations such as the Millennium Development Goals (2000), but especially in the seventeen objectives of the Agenda to 2030 (United Nations, 2015a)¹.

Ensuring the well-being of the growing population of older persons in Sub-Saharan Africa will be essential to achieve the Sustainable Development Goals, in particular, the goals on eradicating poverty, ensuring healthy lives and promoting well-being at all ages, achieving gender equality, ensuring full and productive employment and decent work for all, reducing inequalities between and within countries, and making human settlements inclusive, safe, resilient and sustainable.

The growing number of older persons in Sub-Saharan Africa is a legacy of the high fertility that produced increasingly large birth cohorts during the twentieth century, as well as improving rates of survival to older ages. An estimated 40% of the cohort born in the region during 1950-1955 has survived to celebrate a sixtieth birthday in 2010-2015, with 15 percent of the birth cohort expected to live to age 80. By contrast, among those born in 2000-2005, 66 percent is expected to live to age 60 and 35 percent to age 80 (United Nations, 2016a).

Population ageing is projected to have a profound effect on societies, underscoring the fiscal and political pressures that the health care, old-age pension and social protection systems of many countries are likely to face in the coming decades.

1. This Agenda is a plan of action for people, planet and prosperity. It also seeks to strengthen universal peace in larger freedom. We recognise that eradicating poverty in all its forms and dimensions, including extreme poverty, is the greatest global challenge and an indispensable requirement for sustainable development. The document defines the commitments on sustainable development, which should be achieved by 2030, identifying 17 global goals (SDGs – Sustainable Development Goals and 169 targets. In particular, Objective 1 (No Poverty), Goal 2 (Zero Hunger), Goal 3 (Good health and wellbeing) and Objective 10 (Reduced inequalities) and political decision-makers around the world have acknowledged that inequality in their countries is generally high and constitutes a potential threat to economic and social development in the long term; social protection has been extended on a global scale in a meaningful way for all age groups.

TABLE 8.1

Elderly population from 1950 to 2015 in Sub-Saharan Africa, by age

Years /by age	60-64	65-70	71-75	75-80	80+	80-84
1950	3,645	2,640	1,717	920	536	---
1955	3,939	2,799	1,764	923	488	---
1960	4,356	3,073	1,919	986	508	---
1965	4,857	3,449	2,150	1,109	571	---
1970	5,498	3,894	2,460	1,276	671	---
1975	6,145	4,438	2,810	1,492	806	---
1980	6,986	5,053	3,265	1,774	988	---
1985	7,898	5,749	3,744	2,055	1,188	---
1990	8,884	6,567	4,350	2,425	---	1,047
1995	10,141	7,425	4,997	2,863	---	1,258
2000	11,168	8,463	5,605	3,290	---	1,491
2005	12,666	9,360	6,492	3,704	---	1,748
2010	14,362	10,740	7,306	4,431	---	2,100
2015	16,786	12,366	8,491	5,036	---	2,483

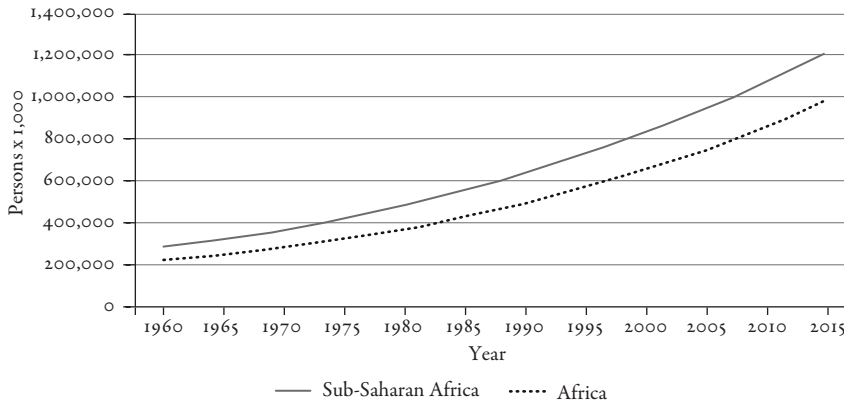
Source: United Nations, 2017.

More data are needed to understand the status and needs of older persons in Africa for example in 2002, African governments formally adopted the African Union Policy Framework and Plan of Action on Ageing (AU Plan), which has been built on the Madrid International Plan of Action on Ageing (MIPAA). The AU Plan committed the signatory member states to develop and implement policies on ageing that are an integral part of national development and poverty reduction. However, efforts to monitor the implementation of MIPAA and the AU Plan in Africa have been limited in part by the dearth of data on older persons in Sub-Saharan African. More and better data and statistics on older persons in the region are urgently needed in order to ensure continued progress in the implementation of MIPAA and the AU Plan, as well as the 2030 Agenda.

Further investigations and implementations with regard to Africa were presented in the document *Agenda 2063. The Africa We Want* processed always in 2015 in Addis Ababa.

FIGURE 8.1

Growth trend of populations from 1960 to 2015: Sub-Saharan Africa *vs* Africa as a whole



Source: United Nations, 2017.

8.2

The Profile of the Elderly in Sub-Saharan Africa

The role of elders in African cultures can be summarised thus: holders of knowledge, archives of memory defenders of traditions, guardians of remedies, protectors of ancestors, owners of lands, houses, herds and flocks.

In Sub-Saharan Africa, older people have traditionally been viewed in a positive light, as repositories of information and wisdom. And while African families are generally still intact, development and modernisation are closely connected with social and economic changes that can weaken traditional social values and networks that provide care and support in later life.

As stated by George Saitoti, Vice-president of Kenya, has pointed out with concern, the phenomenon of ageing occurs in a moment in which Africa as a whole is grappling with a series of other challenges, and a general contraction of available resources. Although the structure of the extended family can traditionally provide an important support to older persons, the weakening of this same structure, due to changes in socio-cultural and economic, is making the elderly increasingly vulnerable and exposed to exclusion, abandonment and misery. Decreasing, at the same time, their participation in the social life of the community and exposing them to the precarious nature of the accommodation, but also to a whole series of other problems and influences.

Mistakenly, we often believe that in African society the traditional respect for the elderly ensures aid and adequate support to all old people. Unfortunately, in recent times it is not so. There are many cases of life where the elderly are vice versa subject to physical and sexual violence and to social, economic and psychological abuses. «Their basic rights, such as the right to life and liberty, the right to work and not to be discriminated against are, in many cases, openly violated» (Universal Declaration of Human Rights, 1948).

8.3 Elderly in Today's Society

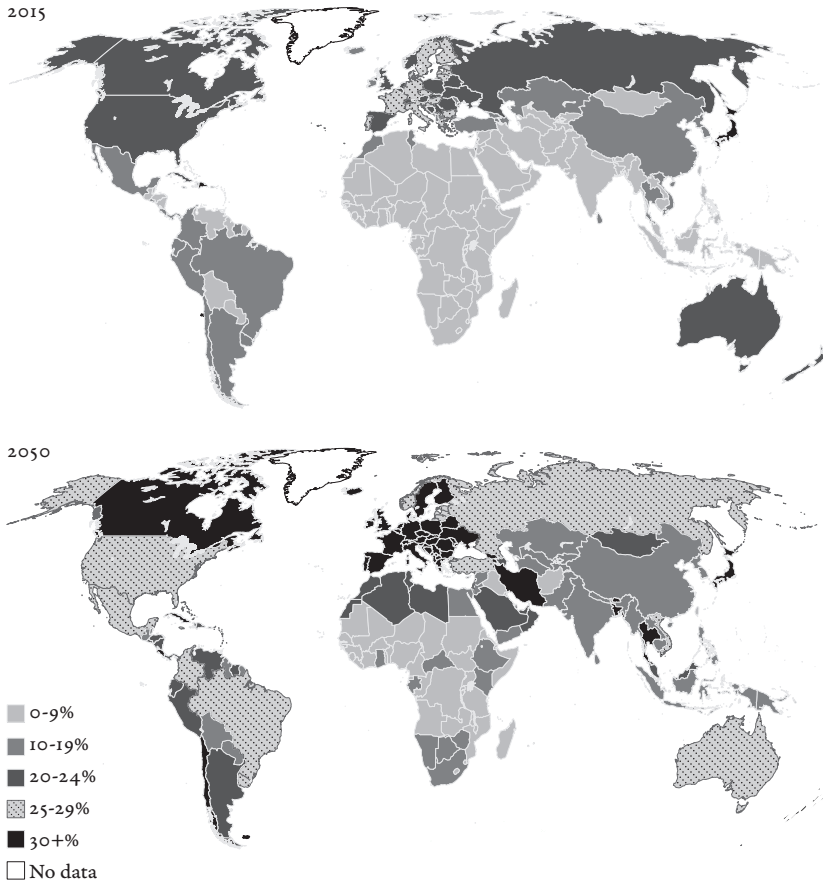
The United Nations defines the elderly those who have reached and passed the age of 60. In Africa, the retirement age falls normally between 55 and 65 years, but in many cases, on the continent, this definition is, at least, inappropriate, or irrelevant. In rural areas, where the registers of births are not accurate or do not exist of all, they normally refer to the physical aspect to estimate the age of people; the colour of the hair, the state of the eyesight, and things like that are an indication to define when a person is old. Nevertheless, the definitions we call "official" are those that determine access of the elderly to services, and that influence social policies and resource assignments.

Within a workshop on international issues and promotion of research on ageing in Africa held in 2004 in Nairobi under the aegis of National Institute on Ageing it was asked for the "National Academies' Committee on Population" to describe who is old. The participants in focus group interviews claimed that old people can be identified in a variety of ways: by their physical attributes or appearance (e.g. grey hair, wrinkles, obvious frailty), by their life experiences (e.g. their reproductive history), or by the roles that they sometimes play in their community. Consequently, chronological age, which in many cases may not even be known in Sub-Saharan Africa, may be a poorer indicator of being elderly than social standing.

The Office of the U.S. Census predicts that over the next thirty years the number of elderly people will double in many countries, for example, in the Democratic Republic of the Congo, where it should go from 2.1 to 4.9 million, in Mozambique from 0.8 to 2.1, Cameroon from 0.8 to 1.6, in Ghana, from 1 to 2.8, and in Uganda from 0.8 to 1.9 million people. Political analysts, who deal with issues related to the ageing of the popu-

FIGURE 8.2

Speed of ageing: proportion of population aged 60 or over in 2014 and in 2050



Source: UNDESA (2015, DVD Edition).

lation, say that the increase in the number of elderly is a challenge for the continent and all its states.

Many older persons whose adult children have migrated in search of work, or who have died as a result of HIV/AIDS, are the main care providers for their grandchildren. In Zimbabwe and Namibia, an estimated 60% of orphaned children were being cared for by their grandmothers (Aboderin, Beard, 2015).

In Botswana, Malawi, Namibia, South Africa, Tanzania and Zimbabwe, up to 60% of orphaned children live in their grandparent's nuclei. Similarly, in Zambia, which has 1.1 million orphans, a third of all orphans live in households in which grandmothers act as mothers.

8.4 Ageing and Gender

The observations that we can make on the theme of the situation of women in Sub-Saharan Africa are not based only on studies or statistics, but on what can be seen in the network through communication-formal and informal (Oppong, 2006).

Here follow some examples of the situation of older women in some countries in Sub-Saharan Africa: Nigeria, Madagascar and Cameroon (FIG. 8.3).

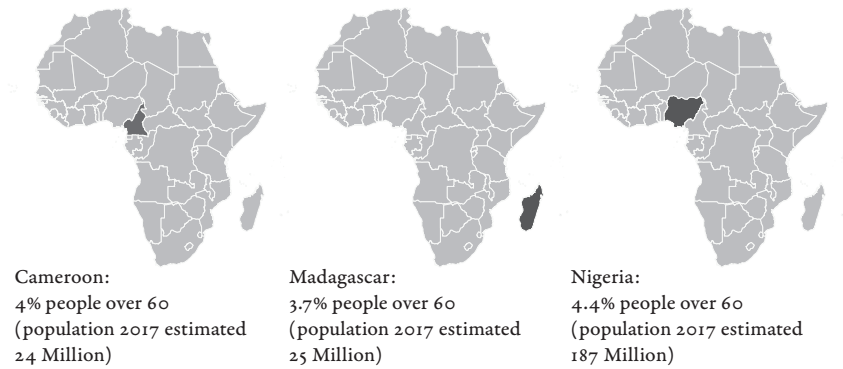
In the coming years, the ageing population in Nigeria is expected to increase in numbers and life expectancy rates will gradually increase with significant social and economic implications to the individuals and the Nigerian government. The old-age dependency ratio is not high at present (at least compared with developed nations) – but it will increase in the coming years. Nigeria must still enact a National Policy on the care and welfare of older persons. There has been a draft law since March 2003.

Changes in family structure in Nigeria are happening: care of older relatives is a value which is culturally rooted and highly respected, but there is an observable progressive shift away from the traditional family, due to economic problems, migration and influence by foreign culture. Regarding care provision for older people in Nigeria, the Nigerian government and political leaders believe that the provision of care is the responsibility of families.

In Nigeria, widowed women are classified into four categories: widows who live with adults with children who go to school, those with only small children, those young and sterile and finally, widows who are elderly and sterile. These older women are treated as witches, abandoned, isolated and often their homes are burnt. They are even the victims of ostracism.

In Malagasy civilisation, elders have always had a privileged position: to guard their moral and ethical values, history and customs.

FIGURE 8.3
Nigeria, Madagascar and Cameroon



Source: CIA, 2017.

For some time, owing to the difficulties and the problems of modern life habits have begun to change. Despite their desire to help the elderly, families cannot do more to take care of parents and they live in conditions of poverty.

Unfortunately, there are situations in which an older woman is abandoned, without a pension and neither social assistance nor medical care. She must get help from charitable organisations or by begging on the street. She is required to replace her daughter who died in childbirth or who is sick, or even abandoned by her husband. Thus, she should devote herself to her grandchildren, feed them and take them to school or church. These women have already had their problems but also have other problems in education and in the relationship with their grandchildren.

In Madagascar, both government and civil society are confronting women's rights issues as never before. Yet much remains to be done, especially to overcome deeply ingrained practices and customs that hinder women's empowerment (Razafindrakoto, 2016).

In Cameroon the elderly who live in poverty, isolated and marginalised by society, in particular older women, are often accused of being witches or vampires.

They are often widows or unmarried, without a legitimate son. They live the little that you see in the street or in the market; they often steal from the fields. They do not receive visits by day or by night. They are abandoned even

by neighbours. The nights are very long, because at sunset they go to bed. After their death, the family argues about the furnishings they leave behind.

A particularly important result achieved by the Maputo Protocol (2003) with regard to older women, has a commitment to ensure that they are protected from gender-based violence and sexual discrimination.

8.5 Health

Health systems in Sub-Saharan Africa have confronted themselves with a growing burden of illness due to non-communicable diseases (NCDs) that are associated with old age.

Communicable diseases continue to account for more than half of all deaths in Sub-Saharan Africa, but NCDs, such as cardiovascular disease, cancer, diabetes and chronic respiratory diseases cause more than half of the total burden of disability in the region (Aboderin, Kizito, 2010).

Since the prevalence of NCD related to disability tends to increase with age, a growing population of older persons implies an increase in the demand on health systems of prevention and treatment of NCDs and of their associated complications.

About half (48%) of elderly Africans of Sub-Saharan Africa are underweight and almost a quarter (21%) are overweight, while 56% of older South Africans are obese. Low-quality diets contribute to poor nutritional status. Poverty, HIV/AIDS and complex humanitarian emergencies are the major determinants of undernutrition. Effective interventions need to consider socio-economic, health and demographic factors; social pensions may be the most cost-effective option to improve the health and nutritional status of the elderly in of Sub-Saharan Africa.

Barriers to health care, faced by older African people, include absence of a guide or the presence high costs of transport to health providers, and fees to private sector for medicines or treatment. Older patients use commercial providers because of the unavailability, perceived poor quality, or age insensitivity of services in government facilities. These providers, in a bid to achieve the Millennium Development Goals on health, typically remain focused on services for infectious diseases, children and reproductive age adults. The difficulties from the supply-side are exacerbated by important demand-side factors. Such obstacles include the fact that normally resources are allocated to poor families (Aboderin, Beard, 2015).

8.6 Welfare

Less than one in five older persons in Sub-Saharan Africa receives an old-age pension (see PAR. 8.4).

Retirement pensions or similar programmes for income support at older ages are critical to the social protection of older persons. According to recent data, just under 17% of people of pensionable age in Sub-Saharan Africa receives any pension, meaning that the overwhelming majority of older persons has to rely instead on their own labour earnings or savings, assistance from relatives, or charity for support. Owing to the prevalence of informal employment in the region, only a small minority, 8.4% of the labour force in 2014 contributed to insurance pensions, indicating that low pension coverage could be perpetuated as soon as current workers reach retirement age.

In most of Sub-Saharan Africa, retirement is a privilege extended primarily to the minority of persons who work in the formal economy and thus that have access to contributory pension programmes. Pensions that are not contributory might effectively reduce poverty in old age but are not yet implemented in most countries of the region. As a result, the majority of older persons in Sub-Saharan Africa do not have any choice except that of continuing to work as long as they are physically able. Among those aged 65 years or over in Africa, 52% of men and 33% of women were active in the labour force in 2015. By comparison, in Latin America and the Caribbean, 38% of older men and 17% of older women were working, and in Europe, only 10% of older men and 6% of older women were working (ILOSTAT, 2016).

In synthesis, countries with relatively low rates of pension coverage tend to have high levels of participation in the labour force among older persons. For example, in Zimbabwe where less than 10% of people of pensionable age receive any pension, 75% of men and 65% of women aged 65 or over are active in the labour force. By contrast, more than 92% of older persons in South Africa received a pension and their participation in the labour force was relatively rare, with only 9% of men and 3% of women aged 65 years or over who were working in 2015 (*ibid.*).

In addition to their labour force participation, older men and women in Sub-Saharan Africa are making other vital contributions to their families and communities (see PAR. 8.3).

8.7

The Global AgeWatch Index in Sub-Saharan Africa

The Global AgeWatch Index has been developed and constructed by HelpAge International using international data sets drawn from the United Nations Department of Economic and Social Affairs, the World Bank, World Health Organisation, International Labour Organisation, UNESCO and the Gallup World Poll.

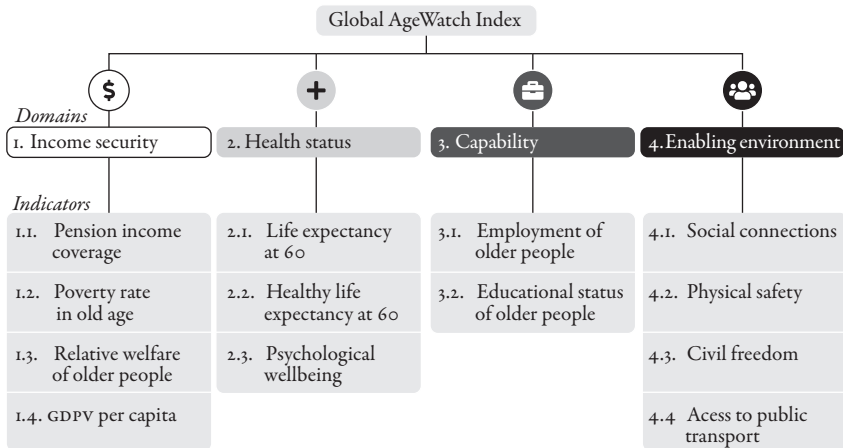
The Global AgeWatch Index assesses the factors determining the social and economic wellbeing of older people around the world. The global analysis in 2015 was performed by hearing older people themselves and looking at the widely varying geographic trends. The index brings together a unique set of internationally comparable data that are based on income, health status, capability (education and employment), and enabling environment of older people. These domains were selected because they were identified by older people and by policy makers alike as key enablers of older people's wellbeing.

The aim of the index is both to capture the multidimensional nature of quality of life and wellbeing of older people, and to provide a means by which to measure performance and promote improvements. 13 different indicators were chosen for the four key domains of *Income security*, *Health status*, *Capability* and *Enabling environment* (FIG. 8.4)².

The index responds to core issues of concern to older people and is a framework for governments and the international community to develop and implement policy and programmes to ensure no older person is left behind. Using the latest available internationally comparable data, 96 countries are ranked by the index, covering 91% of the world's population aged 60 and over.

2. Domain 1: *Income security*: The domain of income security assesses people's access to a sufficient amount of income, and the capacity to use it independently, in order to meet basic needs in older age. Domain 2: *Health status*: The three indicators used for the health domain provide information about physical and psychological wellbeing. Domain 3: *Capability*: The employment and education indicators in this domain look at different aspects of the empowerment of older people. Domain 4: *Enabling environment* This domain uses data from Gallup World View to assess older people's perception of social connectedness, safety, civic freedom and access to public transport – issues that older people have singled out as particularly important.

FIGURE 8.4
Domains and indicators for the Global AgeWatch Index



Source: HelpAge International – 2016.

With regard to Sub-Saharan Africa the index has been calculated for 9 countries: South Africa, Ghana, Nigeria, Uganda, Rwanda, Zambia, Tanzania, Mozambique and Malawi.

South Africa has a low rank placing itself at 78th overall position. It ranks highest in the income security domain (19), with high pension coverage (92.6%), a below average poverty rate (12%) and the second highest GNI per capita (US\$11,764) regionally. It still holds a low rank in the domain of capability (69) but this ranking has increased from last year (75) owing to a revision of data in educational attainment. The ranking of South Africa is low in the domain of enabling environment (83) due to older people's low satisfaction with safety (31%). It is also lowest in the health domain (89), with life expectancy at 60 (16) which is below the regional average of 17.

Ghana ranking is low in the overall Index, placing itself in the 81st position. Its rank is highest in the capability domain (23), with a higher value than average regional on employment (78.2%) and on educational attainment (35.6%) among older people. It ranks moderately in the domain of enabling environment (56) with older people which report an average satisfaction with safety (81%) and civic freedom (85%) above if

TABLE 8.2

Sub-Saharan Africa countries: some indicators relating to the elderly

Countries	Population over 60 (million)	Rank (i)	Rank (ii)	Life expectancy at 60	Healthy life expectancy aged 60	Pension coverage (iii)
South Africa	4.2	1	78	16	14.6	92%
Ghana	1.4	2	81	17	13.8	7%
Nigeria	8.2	3	86	16	14.4	5%
Uganda	1.5	4	88	16	12.9	6%
Rwanda	0.5	5	89	18	13.3	4%
Zambia	0.7	6	90	17	12.2	7%
Tanzania	2.6	7	91	18	14.2	3%
Mozambique	1.4	8	94	16	11.7	17%
Malawi	0.9	9	95	16	11.5	4%

(i) Referred to the Sub-Saharan Africa.

(ii) Referred to the World.

(iii) % people over 65 receiving a pension.

Source: Global AgeWatch Index 2015.

compared to other countries in the region. It ranks low in the health domain (77) with life expectancy at 60 (17) and healthy life expectancy at 60 (14) near to regional averages. It ranks lowest in the income security domain (88), due to low pension income coverage (8%) and a high old age poverty rate (21.4%) that is the second highest in its region.

Nigeria ranks low in the overall Index (86th position). It ranks highest in the capability domain (49), with an employment rate (70.5%) and educational attainment (17.4%) among older people above the regional average. The country ranks low in the domain of enabling environment (75) due to older people's low satisfaction with civic freedom (53%) and public transport (42%). It holds a low position in the health domain (88) with life expectancy at 60 (16) below the regional average for Africa. It results lowest in the income security domain (90), with low pension income coverage (5%).

Uganda ranks low in the index, placing itself at 88th overall position. It ranks highest on the capability domain (45). This increase from the ranking of last year (72) is due to revision of data concerning educational attainment. The country ranks low in the domain of enabling environ-

ment (70) but has above regional average percentages for social connect-
edness (76%) and satisfaction with public transport (50%). It ranks low
in the health domain (92), with below regional averages for life expectan-
cy at 60 (16) and healthy life expectancy at 60 (13). Uganda also ranks in
the 92nd position in the income security domain. The country has one of
the highest rates of old age poverty regionally (20.7%) and low pension
income coverage (6.6%).

Rwanda ranks low in the overall Index (89). It ranks highest in the do-
main of enabling environment (13), the highest in its region with ratings
well above regional values and index averages on all indicators. Rwanda
ranks low in the health domain (81) but with a life expectancy at 60 (18)
above the regional average (17), even if below the Global Index average
(21). It ranks low in the capability domain (90). Although it has an em-
ployment rate (91.8%) well above the regional average (67%), it has one
of the lowest rates of educational attainment among older people (2.8%).
Rwanda ranks lowest in the income security domain (93), with very low
pension income coverage (4.7%) and a higher than average old age pov-
erty rate for compared to other countries in the Africa region (19.9%).

Zambia ranks low in the overall index (90). It ranks highest in the
capability domain (67). This fall from last year's ranking (57) is due to a
change of indicator from labour force participation rate to employment
rate. The country also ranks low in the domain (84) due to older people's
low satisfaction with safety (34%). It ranks at 89th position in the income
security domain, with low pension coverage (7.7%), the highest old age
poverty rate in the region (22.9%) and the lowest rate of relative welfare
(78%) among older people in its region. Zambia ranks lowest in the health
domain (91), with values below the regional averages on all indicators.

Mozambique ranks low in the overall index (94). It ranks highest in the
income security domain (84), with a higher than average rate of old age pov-
erty for its region (19.1%) and second lowest GNI per capita (US\$1,018). It
ranks low in the health domain (94) due to low levels of life expectancy at
60 (16) and healthy life expectancy at the same age (12). It ranks low within
its region in the capability domain (94), with the lowest regional rate of ed-
ucational attainment among older people (1%). Mozambique ranks lowest
in the domain of enabling environment (96), due to older people's low satis-
faction with safety (31%), civic freedom (60%) and public transport (31%).

Malawi ranks low in the overall index (95). It ranks highest in the
capability domain (84). Malawi has the highest employment rate among
older people in its region (96.4%) and low educational attainment

among older people (4.5%). It ranks low in the enabling environment domain (94), due to older people's low satisfaction with social connectedness (48%) and safety (36%). It ranks second lower on the index in the health domain (95) with below regional average life expectancy at 60 (16) and healthy life expectancy (11). It ranks lowest in the income security domain (96), with the lowest regional GNI per capita (US\$717) and second lowest pension coverage in the region (4.1%).

8.8

Legal Instruments on the Rights of the Elderly

Hereinafter are references to some important international and regional documents specific for Africa and Sub-Saharan Africa.

The African Charter on the Rights of Man (1981), which includes the right of the elderly and the disabled to special measures of protection in keeping with their physical and moral needs (Article 18) and action to assist African governments in responding to international resolutions on ageing.

In particular, the Protocol to the African Charter on Human and Peoples' Rights on the Rights of Older Persons in Africa, the fourth session of the Conference of Ministers of Social Development (CAMSD4) held in Addis Ababa (26-30th May 2014).

The twenty-sixth Summit of Heads of State and Government of Africa (30th January 2016), is important because there was a significant step forward: African governments adopted the Protocol on the African Charter on Human and Peoples' Rights on the rights of older people and this occurred after eight years of projects and changes, lobbying, negotiation and pressure for the recognition of human rights of older people.

This Protocol represents the highest level of political commitment by African leaders for the promotion and protection of the rights of the elderly, one of the few decisions taken by the European Union concerning the adoption of an African policy Framework and Plan of Action on Ageing (2002), another important step in the programme for the elderly.

For specific geosocial analysis of these important documents and other minor ones, please refer to the publications of the African Research on Ageing Network (AFRAN) at the Oxford Institute of Population Ageing, a Network which brings together the African members and the international academic world and civil society and creates partnerships to promote education and research on ageing in Africa.

Growing Old in Brazil: Geoanthropological View on Increase of Life Expectancy in the Population

Enrico Bernardini

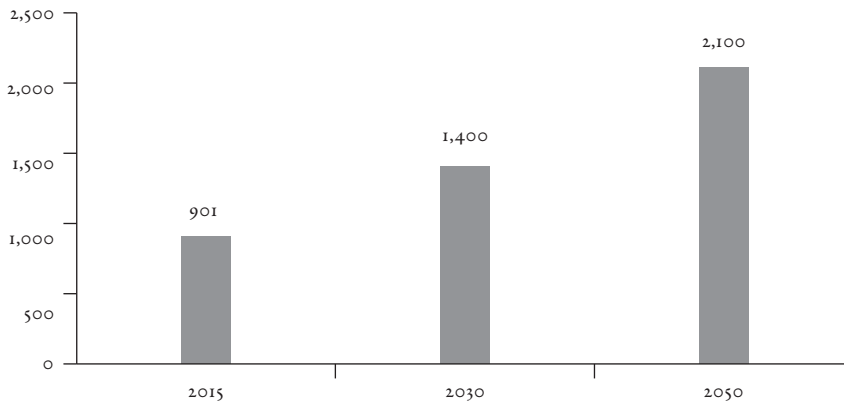
9.1

The global situation

The increase of life expectancy is a result of the reduction of mortality. Currently, there are already 810 million people aged 60 and older. The perspective is considering this phenomenon as one of the greatest cultural achievements in the process of humanisation and a consequence of the improvement of life conditions (International Longevity Centre Brazil, 2015).

Between 2015 and 2030, the number of people in the world aged 60 years or more is expected to grow by 56 per cent, from 901 million to 1.4

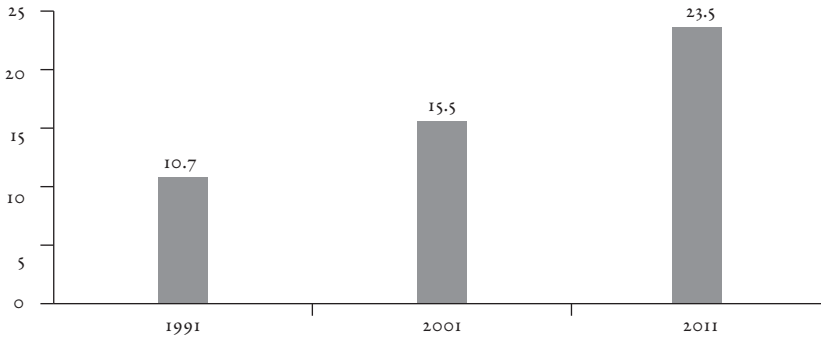
FIGURE 9.1
World population ageing: people over age sixty (million)



Source: http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015_Report.pdf.

FIGURE 9.2

People aged 60 years in Brazil from 1991 to 2011 (million)



Source: <http://www.sdh.gov.br/assuntos/pessoa-idosa/dadosestatisticos/Dadosobreoenvelhecimentono-Brasil.pdf>.

billion, and by 2050, the global population of older persons is projected to be more than double its size of 2015, reaching nearly 2.1 billion (United Nations, 2015).

According to the United Nations' projections, one in every nine people in the world is 60 years or more, and the growth is estimated to 1 in 5 by 2050.

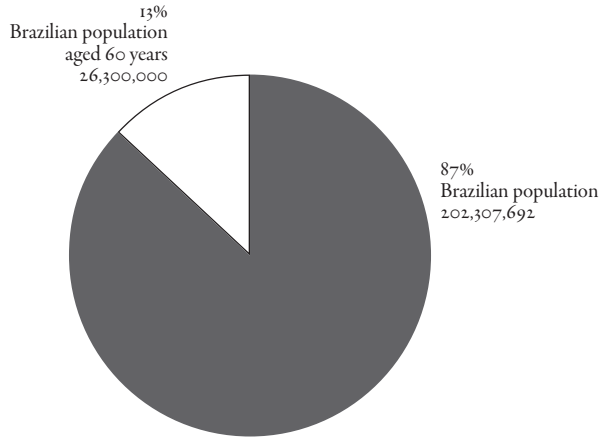
9.2

The Brazilian situation

The ageing trend of the population in Brazil was analysed in some research by IBGE (<https://www.ibge.gov.br/apps/snig/v1/?loc=o&cat=&tema=4691>), the Brazilian Institute of Geography and Statistics. The data referred to the last census in Brazil, done from 2010 to 2011 (<http://www.sdh.gov.br/assuntos/pessoa-idosa/dados-estatisticos/DadosobreoenvelhecimentonoBrasil.pdf>). Elderly people over 60 years were 23.5 million in 2011, more than double that recorded in 1991, when the age group included 10.7 million people.

The chart shows the growth of people aged over 60 years in Brazil from 1991 to 2011.

FIGURE 9.3
Brazilian population in 2015



Source: <http://www.ibge.gov.br/apps/snig/v1/?loc=0&cat=8&tema=4691>.

According to the estimates of IBGE, in 2015 there were already 26 million elderly people in Brazil that make up 13% of the whole population. In 2030, following the global projections, the figure will reach 30 million.

The phenomenon of the over-sixty population increase goes hand in hand with the decrease in the birth rate, which makes Brazil one of the countries with the lowest percentage of fertility in the world.

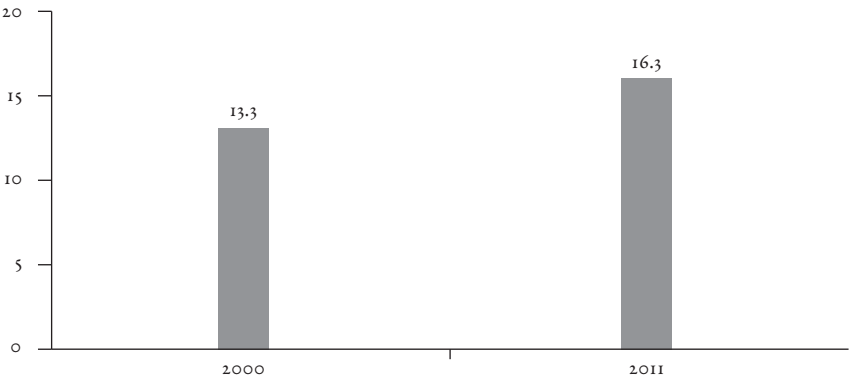
In Brazil, fertility in 1950 was 6.2 children per woman and only 5% of the population was aged 60 years or more, but – starting around 1960 – fertility declined rapidly to 1.8 children per woman in 2015, and it is projected to remain below replacement at least until 2050 (United Nations, 2015).

As the graph shows, the number of children up to four years in the country decreased from 16.3 million in 2000 to 13.3 million in 2011.

The decrease of fertility rate is influenced by increasing girls' education, seen as a very positive factor for economic and social development of the country.

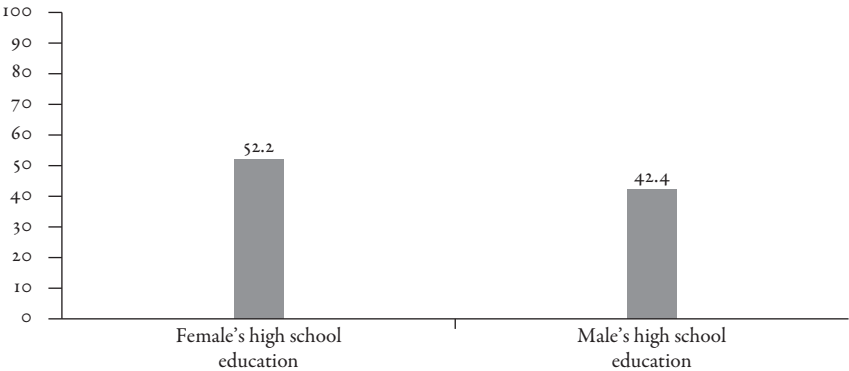
Some research by IBGE, comparing the last censuses carried out in the country between 2000 and 2010, reveals that women's education has increased compared to men's in recent years.

FIGURE 9.4
The decrease of number of children in Brazil from 2000 to 2011 (million)



Source: http://www.un.org/en/development/desa/population/publications/pdf/ageing/WPA2015_Report.pdf.

FIGURE 9.5
Comparison between men and women's education in 2010 (%)



Source: <http://www.brasil.gov.br/cidadania-e-justica/2014/11/escolaridade-das-mulheres-aumenta-em-relacao-a-dos-homens>.

In fact, between 2000 and 2010, females' high school education has grown by 9.8%, arriving at 52.2% compared to males' at 42.4%. (<http://www.brasil.gov.br/cidadania-e-justica/2014/11/escolaridade-das-mulheres-aumenta-em-relacao-a-dos-homens>).

The new needs of the elderly (like autonomy, mobility, access to information, services, security and preventive health care) triggered the in-

tervention of the Brazilian Government that in the last thirty years has put in place legal instruments that guarantee the social protection and the expansion of rights for older people, according to the guidelines of the United Nations.

The main legal instruments are:

- Statute of the Elderly (2003).
- National Conference about elderly people's rights (2006, 2009, 2011).
- Form of the Observatory of Human Rights to report elder abuse (called: Disque 100), 2011.
- National Commitment to active ageing (2013).

9.3

The Statute of the Elderly

The Statute of the Elderly, enacted by Law no. 10741 of 1st October 2003, aims to regulate and safeguard the rights of people more than sixty years old.

The statute guarantees to the elderly the right to life, health, nutrition, education, culture, sports, leisure, work, citizenship, freedom, dignity, respect and, through specific legislation, protects the elderly from all forms of violence or discrimination or violation of rights.

Free health care is also provided to seniors through the Brazilian Health System, increasing the prevention and promotion of actions to ensure a greater focus on diseases that primarily affect older people.

The aim of the statute is also to allow access of older people to education, culture, sports, leisure and entertainment, through specific opportunities created by the government. In addition, the state will have the opportunity to provide public transport with free access to people aged over sixty.

The task of the state will also be to promote the organisation of seminars and conferences to assist seniors in learning the use of new technologies, especially Information and Communication Technology (ICT), to help them to stay increasingly updated with the times, in everyday life.

The various organisations of the country will endeavour to provide discounts to seniors, who participate in artistic, cultural and sporting manifestations.

Finally, the government will support the creation of a university for older people and will strive to implement policies to encourage the reading of books and magazines, in order to reduce the population's illiteracy.

9.4

The National Conference about Elderly People's Rights

The Brazilian Government has promoted three major conferences about elderly people's rights (2006, 2009, and 2011), the most important of which was the last one, which took place in 2011. During the third National Conference about the Rights of Older Persons, held from 23rd to 25th November 2011 in Brasilia, 26 proposals made by the working groups that participated were approved (Presidência da República, 2013).

The main ones are the following:

- Effect and universalise the rights of the elderly, as well as their social inclusion, respecting the dignity of citizens, their autonomy and their talents, facilitating access to information, benefits and quality services, as well as to the family and community life.
- Expand and finance the creation of the National Secretariat for the Elderly and a Centre against Violence and Abuse of Elderly.
- Ensure and expand access to prevention programmes, health promotion, treatment and rehabilitation of the elderly.
- Develop, implement and monitor the National Elderly Plan, planning and management between various public policies in order to set-up programmes, projects and services involving health, social assistance, housing, education, transport and culture.
- Create the National Elderly Secretariat, encouraging states and municipalities to enact the same procedures in order to develop the elder policy.
- Expand public policy for the inclusion of the elderly in all stages of education (literacy, Primary School, Secondary School and University) and create the Universities of the third age.
- Disseminate and promote information and education campaigns on the Statute of the Elderly and other legislations about the elderly with an accessible language, illustrations, also in Braille, books to talk about the difficulties of ageing, discrimination and violence, widely and systematically encouraging an intergenerational process, at a national and local level, using the media (TV, radio, newspapers, magazines, brochures, posters, educational materials, etc.).
- Create immediately the Council and the State and Municipal Fund for seniors.
- Promote the coordination at all levels of government and civil society (state, regional and national) of a regulation and distribution of mu-

municipal funds in favour of elders, ensuring that municipalities, states and the federal district devolve at least: 1) 1% (one percent) of the revenues provided in their respective budgets; and 2) 2% of the collection of federal and state lotteries, as well as all funds collected from fines provided from the articles 56 to 58 of the Statute of Elderly to investments aimed at active ageing initiatives and health protection.

9.5

Form of the Observatory of Human Rights to Report Elder Abuse (Disque 100)

The Disque 100 (Call 100) is a public service of the Secretariat for Human Rights (SDH/PR), National Observatory on Human Rights, with the purpose of receiving reports of human rights violations, particularly those about people with greater vulnerability, such as children, elderly, persons with disabilities, LGBT people, homeless and other categories of disadvantaged people (<http://www.sdh.gov.br/disque-direitos-humanos/disque-direitos-humanos>).

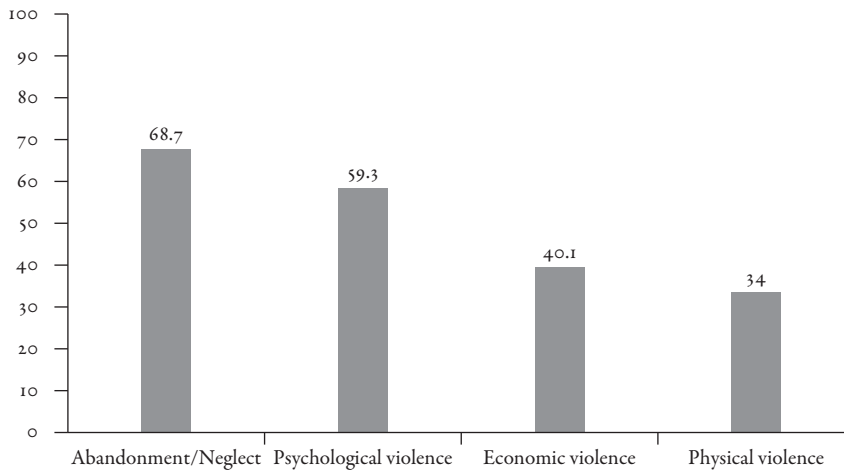
Between 2011 and 2012, Disque 100 received 28,564 reports of abuse on older people.

Analysing the data, the service recorded 68.7% of the violations for abandonment/neglect, 59.3% of psychological violence, 40.1% of financial/economic violence and 34% of physical violence (Presidência da República, 2013).

In 2012, the Human Rights Secretariat reaffirmed its commitment to work assiduously for the recognition of the law about the rights of the elderly, establishing mechanisms to carry out the national and international provisions. The secretariat coordinates the elaboration of the National Plan for the Rights of Elderly. The National Plan on the Rights of the Elderly aims to establish targets of national strategies and priorities as a basis for sectoral and regional programmes, responding to the demands and needs of a society increasingly worried about respect and promotion of the basic rights of the elderly.

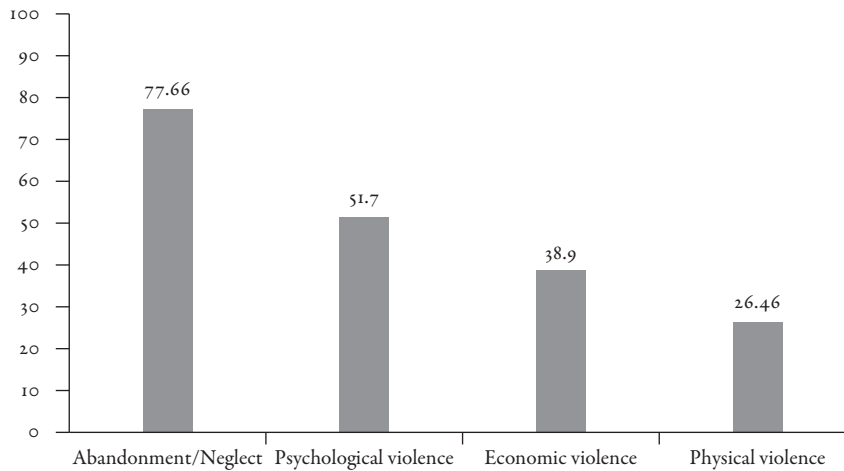
In 2015, there was a slight increase in violations for neglect with 77.66% and 51.7% of psychological violence, 38.9% of financial abuse/economic violence and 26.46% of physical violence (Presidência da República, 2015).

FIGURE 9.6
Observatory Disque 100 2011/2012



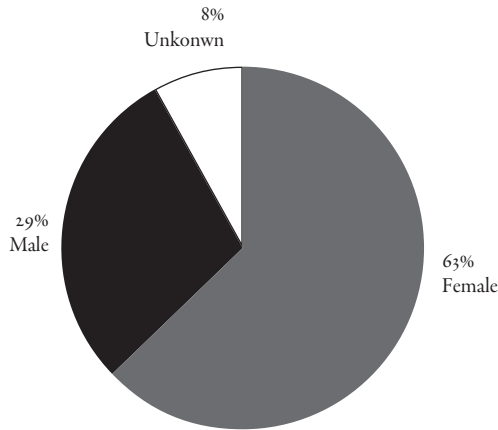
Source: <http://www.sdh.gov.br/assuntos/pessoa-idosa/dados-estatisticos/Dadosobreoenvelhecimento-no-Brasil.pdf>.

FIGURE 9.7
Observatory Disque 100 in 2015



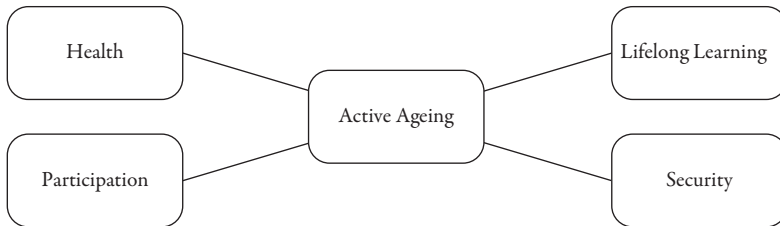
Source: <http://www.sdh.gov.br/assuntos/pessoa-idosa/dados-estatisticos/Dadosobreoenvelhecimento-no-Brasil.pdf>.

FIGURE 9.8
Gender of victims in 2015



Source: <http://www.sdh.gov.br/assuntos/pessoa-idosa/dados-estatisticos/Dadosobreoenvelhecimento-no-Brasil.pdf>.

FIGURE 9.9
The pillars of Active Ageing



Source: International Longevity Centre Brazil, <http://ilcbrazil.org/>.

9.6 National Commitment to Active Ageing

The International Longevity Centre is a very important institution in Brazil, operating in partnership with the government, with the purpose of building useful innovation and evidence-based strategies to drive policies about population ageing and the concept of Active Ageing (official website: <http://ilcbrazil.org/>).

Active Ageing is the process of optimising opportunities for health, lifelong learning, participation and security in order to improve the quality of life of the elderly. To develop a policy about Active Ageing, we can consider the following four pillars of Active Ageing: health, lifelong learning, participation and security (International Longevity Centre Brazil, 2015).

Pillar 1. Health. Active Ageing aims to improve population health and reduce health inequalities in order to increase life expectancy in Brazil, in accordance with the vision of the World Health Organisation.

Pillar 2. Lifelong Learning. Globalisation and rapid changes in the modern world have made it essential, even for the elderly, access to information and new technologies. The access to information, learning throughout life is important not only for employability, but also to promote wellness. It is a pillar that supports all the other pillars of Active Ageing.

Pillar 3. Participation. Participation does not simply mean paid work, but the aim of this pillar is the involvement of the elderly in all fields (social, civil, recreational, cultural and intellectual, sports or spiritual).

Pillar 4. Security. Security is the most basic of human needs. Without it, the community is not fully capable of developing its potential and policies about Active Ageing. A lack of security has detrimental effects on physical health, emotional well-being and the social background of a society.

The Impact of Inequality Factors on Frailty Conditions Among Older Population

Stefano Poli

IO.1

Introduction

This contribution highlights the importance of social determinants of individual frailty among older people and how, especially in Italy (Giarelli, 2013), the frailty in the ageing experience arises more and more from the hybridisation of multiple generative factors (Poli, Pandolfini, 2016; Poli *et al.*, 2016; Ferrucci, Giallauriaf, Guralnik, 2008), related to social and structural dimensions (for instance, education, income, status, employment in life), combined with individual characteristics (age, sex, genetic background) and lifestyles (nutrition, physical activity, daily habits, etc.).

Focusing on such social determinants and considering the diffused demographic ageing, underlines how the early recognition of frailty among elderly people becomes a priority, both as a matter of public health and in terms of methodology, due to the deep and complex multi-dimensionality of the phenomenon requiring screening modalities able to combine the clinical aspects with the social determinants of frailty itself (Metzelthin *et al.*, 2010).

To this aim, adopting such a multidimensional perspective, this article aims to explore frailty among a sample of community-dwelling elderly people observing its possible association with social factors, while also offering an opportunity to examine the results of a first application in Italy of the FRAIL scale, an important self-report instrument recently realised in the United States by the International Association of Nutrition and Ageing (Morley, Malmstrom, Miller, 2012).

Methods: an Operative Definition of Frailty and its Related Social Factors

This study was carried out in Genoa, Italy. Focusing on the area of the inner centre district, we analysed a population-based sample drawn from the 8,504 residents aged 65 years and older (as of 1 January 2013, source: Genova Municipality, 2013). 2,000 subjects, equally distributed by gender and age-class (65-74 years old and 75 years and older), were randomly extracted and contacted via recruitment notices, mails and phone calls. The preliminary inclusion criterion was the adequate cognitive ability to respond to a 30-minute face-to-face questionnaire, administered by researchers at home or at the university. Of those contacted, 27.2% responded. The final study population included 542 subjects, reflecting the starting population according to a confidence interval of 5% and a confidence level of 95%.

Frailty was ascertained by means of the *FRAIL* scale (Morley, Malmstrom, Miller, 2012), based on the following 5 items: Fatigue, Resistance, Ambulation, Illness, and Loss of weight. *FRAIL* scale scores range from 0 to 5 (1 point for each component); subjects were then classified as frail (score 3 to 5), pre-frail (score 1 and 2), and not frail (score 0).

The exploration of frailty conditions has been combined with observation of disability and autonomy in terms of physical and instrumental skills though ADL (Katz, 1983) and IADL scales (Lawton, Brody, 1969).

Basic ADLs included seven items (bathing, dressing, eating, transferring bed or chair, walking across a room, getting outside and using toilet). ADL difficulties represent the number of these tasks for which respondents reported difficulty performing the task. ADL dependency was defined as positive when respondents reported difficulty on an ADL item and, also, reported *a*) being unable to do the task or *b*) receiving help from another person to do the task. IADLs included eight items (preparing meals, shopping for groceries, managing money, making phone calls, doing light housework, doing heavy housework, getting to places outside walking distance, and managing medications) and was scored as the number of tasks for which the respondent reported difficulty performing that task.

The ADL and IADL tasks were counted assigning 1 point for each reported difficulty or inability to perform, recoding a final individual score given by the sum of ADL and IADL deficits.

We observed the associations of frailty with age and gender. Age was considered in chronological and not in functional terms, as a mere struc-

tural variable, because less self-sufficiency and loss of autonomy are only partially related to age, being age-dependent is a much more differentiated and dynamic processes (Bergman *et al.*, 2007).

Gender issues in frailty among elderly were specifically taken into account. Indeed, even if women's lower mortality rates may contribute to sex differences in the prevalence of functional impairment and disability (Alley, Crimmins, 2013), major gender differences also emerged when measured with observed performances (Merrill *et al.*, 1997; Oman *et al.*, 1999).

We evaluated the level of education, scored according to the International Standard Classification of Education, i.e. 0 = No qualification; 1 = primary school; 2 = secondary school; 3 = vocational school of 2-3 years; 4 = high school; 5 = bachelor's degree; 6 = PhD.

The economic conditions, referred both to individual and to household disposable income (Breen, 2007), were evaluated in terms of: *a*) the amount of the respondent's income and that of all other family members (pension, disability allowances, real estate rentals and investments, salary, economic aid from other family members or institutions or charities, *b*) the incidence of respondent's income on total family income, and *c*) the overall declared ability to support routine expenses (Poli, 2014).

The present and former occupation (85% of respondents were retired) was recorded according to the socioeconomic model as described by De Lillo and Schizzerotto (1985): *a*) unskilled workers; *b*) less qualified workers; *c*) qualified workers and lower service class; *d*) middle-class city-dwellers; *e*) white collar workers; *f*) entrepreneurs, managers and higher service class.

Life-style factors were explored by revising the social practice scale of Cesareo (2007) and observing the frequency (null, rare, frequent, daily) of several activities according to four main dimensions: cultural fruition, technological access, physical activity and social activation. Cultural fruition mainly concerns "mental exercise" linked to leisure activities (hobbies; reading books, magazines and newspapers; using media; going to the theatre or cinema; participating in cultural events; travelling abroad or on short trips; frequenting public places). Respondents' technological access was evaluated by observing the use of devices or technological practices (mobile, pc, internet, online payments and credit cards). The level of physical activity was recorded by asking how often respondents went for a walk or engaged in sporting activities. Lastly, social activation was observed through an index of "social talent" among elderly people (Poli, 2014), which was measured by observing the attitude to perform socially-useful activities under four aspects: individual willingness to offer pro-

fessional, social and cultural experience to others; collaboration with associations and organisations; voluntary activities; care activities, such as fostering or caring for children or disabled subjects.

The relationships between frailty and all other potentially associated demographic, functional, socioeconomic and lifestyle factors were examined by a two-step cluster analysis (adopting log-likelihood procedures for distance measures and Schwarz's Bayesian Criterion for the clustering model) using the following as categorical variables: the recoded conditions of frailty (not frail, pre-frail and frail), sex, age (in years) and other continuous variables (in standardised form), i.e. the sum of ADL and of IADL impairments, the levels of education, economic condition, occupational status, cultural fruition, technological access and social activation. Six clusters emerged from the cluster analysis; their distribution and features are described in the results section using means and standard deviations to outline the profiles across each indicator and adopting Student's *t* values as a measure of the relative importance of each indicator in characterising each cluster.

10.3

Results: Different Frailty Profiles, Different Inequality Levels

The cluster analysis revealed six profiles (TAB. 10.1) based on three different grades of frailty for both sexes. As shown in TAB. 10.3, a significant decline in ADL and IADL and high mean age marks the "frail" profile of cluster 1 (9.0% of the sample, women with a mean age of 79.8 years \pm 5.5 SD) and cluster 2 (6.1%, males with a mean age of 79.2 years \pm 4.8 SD). Subjects in clusters 1 and 2 showed high levels of functional impairments and low levels of physical activity. In both clusters, student's *t* values (used to reflect the relative importance of each variable in determining each profile) confirm the strong impact of physical decline as a determinant of frailty, and the negative impact of low levels in socioeconomic (i.e. education, economic condition and occupational status) and lifestyle domains (i.e. cultural fruition, technological access and social activation), moreover still showing gender inequality as reported by major relative intense deprivation observable in older women.

Clusters 3 (17.9%) and 4 (15.5%) represent the "pre-frail" profile of older females (76.2 mean age, \pm 6.2 SD) and males (75.1 \pm 6.9 SD), respectively.

TABLE 10.1
Cluster distribution and characteristics

	Cluster number	1	2	3	4	5	6	Com- bined
	Label	Frail Female	Frail Male	Pre-Frail Female	Pre-Frail Male	Robust Female	Robust Male	
Cluster data	N	49	33	97	84	137	142	542
	%	9.0	6.1	17.9	15.5	25.3	26.2	100.0
Age	Mean	79.8	79.2	76.2	75.1	73.6	73.6	75.2
	Std. Dev.	5.5	4.8	6.2	6.9	5.8	6.1	6.4
	Student's t	6.8	4.1	1.5	0.2	-3.2	-3.1	
Sum of ADL deficits	Mean	1.578	1.013	0.011	-0.007	-0.380	-0.417	0.000
	Std. Dev.	1.221	1.418	0.958	0.944	0.431	0.349	1.000
	Student's t	9.0	4.1	0.1	0.1	-10.3	-14.2	
Sum of IADL deficits	Mean	1.365	1.047	0.232	0.221	-0.487	-0.535	0.000
	Std. Dev.	0.877	1.098	0.985	0.939	0.596	0.539	1.000
	Student's t	10.9	5.4	2.3	2.2	-9.6	-11.8	
Educa- tion	Mean	-0.574	-0.197	-0.164	0.008	0.101	0.254	0.000
	Std. Dev.	0.992	1.001	0.988	0.979	0.954	0.974	1.000
	Student's t	-4.1	-1.1	-1.6	0.1	1.2	3.1	
Economic condition	Mean	-0.574	-0.112	-0.256	0.059	0.008	0.356	0.000
	Std. Dev.	0.848	1.065	1.022	0.873	1.014	0.943	1.000
	Student's t	-4.7	-0.6	-2.5	0.6	0.1	4.5	
Occu- pational Status	Mean	-0.564	-0.012	-0.246	0.220	-0.128	0.359	0.000
	Std. Dev.	1.081	0.993	1.088	0.813	1.039	0.806	1.000
	Student's t	-3.7	0.0	-2.2	2.5	-1.4	5.3	
Cultural fruition	Mean	-0.843	-0.806	-0.233	0.027	0.321	0.312	0.000
	Std. Dev.	0.867	0.893	0.863	1.017	0.967	0.864	1.000
	Student's t	-6.8	-5.1	-3.0	0.1	3.9	4.3	
Techno- logical access	Mean	-0.612	-0.639	-0.386	-0.048	0.052	0.602	0.000
	Std. Dev.	0.720	0.624	0.897	1.019	0.920	0.948	1.000
	Student's t	-6.0	-5.8	-4.2	-0.4	0.7	7.6	

(continued)

TABLE 10.1 (*continued*)

Cluster number		1	2	3	4	5	6	Com- bined
Label		Frail Female	Frail Male	Pre-Frail Female	Pre-Frail Male	Robust Female	Robust Male	
Physical activity	Mean	-0.966	-0.809	-0.241	-0.077	0.412	0.334	0.000
	Std. Dev.	0.716	0.815	0.856	0.988	0.891	0.934	1.000
	Student's <i>t</i>	-9.4	-5.7	-2.8	0.7	5.4	4.3	
Social activation	Mean	-0.515	-0.551	-0.071	0.062	0.193	0.132	0.000
	Std. Dev.	0.828	1.054	1.006	0.947	0.945	1.025	1.000
	Student's <i>t</i>	-4.4	-3.0	-0.7	0.6	2.4	1.5	

Both clusters are characterised by initial functional impairment and decline in physical activity, which are associated with moderate levels of cultural fruition, limited technological access and moderate levels of social activation. However, pre-frail males clearly display a middle-class profile (as confirmed by positive *t* values of economic conditions and occupational prestige), and even show an acceptable propensity to physical activity. By contrast, the female pre-frail profile resembles typical lower-class conditions (with negative *t* values in education, economic condition and occupational prestige) and is exceeded even by the socioeconomic status of male respondents with full-blown frailty (who display less disadvantaged *t* values in education, economic condition and occupational prestige).

Lastly, clusters 5 (25.3%) and 6 (26.2%) outline the profiles of “robust” young-old female and male respondents (mean age of 73.6 ± 5.8 and 73.6 ± 6.1 years, respectively). These subjects show less disability and high levels of cultural fruition, average levels of technological skill and significantly high levels of social activation. In comparison with their male counterparts in cluster 6, females in cluster 5 seem slightly more inclined to physical activity (positive *t* values of 5.4 *vs* 4.3) and social activation (2.4 *vs* 1.5). By contrast, males in cluster 6 seem significantly more digitally integrated than females (7.6 *vs* 0.7). Nevertheless, the two clusters, despite sharing good levels of education, display evident differences in terms of class and status, with a clear gender disparity (*t* values of 4.5 for males *vs* 0.1 for females in economic conditions and of 5.3 *vs* -1.4 for women in occupational prestige).

10.4 Conclusions

The profiles that emerged confirm the association of different frailty conditions and possible social factors in the ageing process.

A major activation, in physical terms and in terms of social integration and participation (conceived as higher levels of cultural fruition, adhesion to associations and groups) evidently reproduces protective factors against the risk of frailty. Similarly, more “robust” conditions seem to be associable to a major availability of resources, both in terms of economic conditions and lifestyle. Better health conditions seem to derive from more skilled professional experiences and affluent past occupational conditions in previous life phases, determining also higher perception of entitlements and provisions, potentially translating into higher propensity to activation, both in a physical sense (positively impacting on health conditions) and in a collective perspective (preserving identities and social roles).

On the contrary, the decline in frailty conditions seems to emerge in more disadvantaged conditions, where individual biographies show lower levels of resources and less affluent lifestyles.

Thus, the occupation prevalently developed in life and the consequent socioeconomic privileges seem to be predictive also of better quality of relations, as well of healthier and more active lifestyles during the retirement phase, confirming as key determinants for health conditions experienced in later life (Cavazza, Malvi, 2014).

Such relevance of social factors does not emerge only in the differentials between frail and robust profiles, but also among subjects of adequate health conditions. Indeed, the lesser active robust respondents substantially correspond to the clinical profile of older sedentary subjects, whose lifestyle can significantly reduce chances of ageing in good health and of longevity (Stessman *et al.*, 2009).

An utter interpretative element emerges from the indicators composing the FRAIL scale. Indeed, the measures regarding ambulation, resistance and fatigue focus on corporeity of conditions, essentially corresponding to the mobility dimension. In this sense, physical mobility reflects a primary condition of individual agency, conceived as the capability to actively intervene with a transformative effect on the living environment. Clearly, whenever an older subject results limited in mobility, both due to disability and structural limitations deriving from contextual adversity (in terms of accessibility barriers or closures, and in physically or socially determined),

she lacks the possibility to interact with the surrounding daily ambient, with consequent losses in cognitive stimulation and physical exercise.

Essentially, the clear relations between frailty and social factors show how becoming elderly, from the first retirement from the labour productive phase till the later stages of ageing, reproduces a crystallisation of social inequalities, whose generative factors already derive from previous periods of life (Poli, Pandolfini, 2016).

Ageing irremediably ratifies such inequalities, also because the progressive loss of agency, shows the impossibility of changing the surrounding environment in any way, being at this point precluded any chance of social mobility, somewhat possible only in the previous phases of existence.

In this sense, exactly the better or worse results in ageing differentials, corresponding to minor or major frailty conditions, seem particularly related to social, economic and cultural resources, permitting different lifestyles and determining consequently higher or lower levels of resistance and resilience to factors of frailty, disability and morbidity.

In other words, this reproduces, on the one hand, the unequal distribution of effective opportunities of successful ageing only for someone and, on the other hand, it determines for others, often socially more vulnerable, an acceleration of the ageing process, increasing the probability of institutionalisation and of mortality.

Building Sustainable Learning: the Age-Friendly University (AFU) and Engagement of Older Adults for a Better Future

Rob Mark

II.1

Generations of Reflection and Response Around Later Life Learning

When seeking answers to the question, *how should universities respond to the needs and desires of older adults*, it is important to be clear about what the purposes of learning are as they ultimately influence the learnings that transpire. Rubenson (1998) identifies an early generation of ideas about lifelong learning with its roots in humanistic traditions and utopian visions. This assumes that people live in a world where the individual is highly motivated to learn, constantly seeking new knowledge. These visions were followed by a new generation of ideas from the late 1980s of lifelong learning, which appeared to be structured around an economic worldview (p. 2). Here the focus is on supporting the needs of the economy, and education is focused on providing training and qualifications to meet perceived labour market demand.

A further generation of concern has emerged based on the connections between learning and wellbeing. Older people are more vulnerable to diminished health and wellbeing and may hold limited access to the learning and life skills necessary to stay well (Ludescher, 2016; Schmidt-Hertha, 2016; Selwyn *et al.*, 2003). There are large political and pedagogical issues that must be considered by universities and communities engaged together in later life learning (Borg, Formosa, 2016). Our focus is on this *fourth generation* of concern around later life learning and its potential for overcoming the hurdles between older adults and higher education; however, we reach a step further.

Across these generations, we find the premise that *learning throughout life is a human right* as a cornerstone of adult education and later life learning (Schuller, Watson, 2009). This premise is held by this article's authors drawing on lessons from those like Schuller and Watson (*ibid.*).

They offer ten proposals for upholding the human right to learn throughout life, but among their proposals are a call for the strengthening of choice and motivation to learn, a framework to give people control over their own lives as citizens, and strategising on local, regional and national levels. Modern learning theories and practice must do more to not see education as a commodity to be bought (Kolland, Ludescher, Waxenegger, 2016). These notions can be seen as our principles for and work towards the Age-Friendly University (AFU).

11.2

The Age-Friendly University (AFU): New Beginnings

In 2012, the Ministers of Education from the 47 members of the European Higher Education Area (EHEA) issued a proclamation that the student body entering and graduating from higher education institutions should reflect Europe's diverse populations, from which a commitment was made that included a focus on the ageing population. 2012 was deemed the European Year for Active Ageing and Solidarity between Generations (Withnall, 2016). While in the United States, organisations like the National Council on Ageing and events such as the White House Conference on Ageing continue to emphasise the empowering role of education (Manheimer, 1998; 2005) the connection between higher education and older adults remains insufficiently legitimated.

The story of the Age-Friendly University began at Dublin City University. Researchers, adult learners and external partners representing older adults' interests together developed ten principles (see TAB. 11.1) that underpin the AFU (<https://www.dcu.ie/>).

These design principles set the challenge incorporating the interests of older adults into a university's core teaching, research and engagement (civic) activities. The AFU seeks to play a leadership role in strategically addressing the challenges of an ageing population through its research agenda, curriculum development, engagement with the ageing community and relationship to its own academic and support staff and students. This requires an interdisciplinary perspective harnessing the institution's expertise and resources to investigate and address older adults' interests in relation to larger societal issues. The AFU approach also includes intergenerational learning programming that brings together younger and

TABLE 11.1

The Age-Friendly University (AFU) – Principles

- 1 To encourage the participation of older adults in all the core activities of the university, including educational and research programmes.
- 2 To promote personal and career development in the second half of life and to support those who wish to pursue “second careers”.
- 3 To recognise the range of educational needs of older adults (from those who were early school-leavers through to those who wish to pursue Master’s or PhD qualifications).
- 4 To promote intergenerational learning to facilitate the reciprocal sharing of expertise between learners of all ages.
- 5 To widen access to online educational opportunities for older adults to ensure a diversity of routes to participation.
- 6 To ensure that the university’s research agenda is informed by the needs of an ageing society and to promote public discourse on how higher education can better respond to the varied interests and needs of older adults.
- 7 To increase the understanding of students of the longevity dividend and the increasing complexity and richness that ageing brings to our society.
- 8 To enhance access for older adults to the university’s range of health and well-being programmes and its arts and cultural activities.
- 9 To engage actively with the university’s own retired community.
- 10 To ensure regular dialogue with organisations representing the interests of the ageing population.

older students, learning from each other for their mutual benefit (for example, Corrigan *et al.*, 2013).

The AFU represents one example of a strategic response on the part of higher education to the changing nature of the life-course from a linear to a more dynamic and complex model. Increased longevity, coupled with the changing nature of work (e.g. more IT and home-based), employment (e.g. insecurity) and family structures (e.g. more single households and “patchwork” families) suggest the need for a new view of the stages of life.

The impact of the AFU’s dialogue between universities and the germination of its principles within the universities remains uncharted; however, we share stories of its beginning from three university perspectives. We use the word “dialogue” above to signal that higher education institutions are places not only for the exchanges of thought, but also places for mutual learning (Kolland, Ludescher, Waxenegger, 2016). Although in its be-

ginnings, the stories show AFU's commitment at the highest level of these universities to widen the participation of older adults in universities, there is no single blueprint on how the AFU might be developed (Slowey, 2015). We examine how the AFU concept has been applied in the three universities that define the core of the AFU movement to date – Dublin City University, the University of Strathclyde and Arizona State University.

11.3

Case Study 1: the University of Strathclyde

The University of Strathclyde is one of a small number of universities in the UK, which is growing a special focus on providing for the educational needs of older adults. The University's egalitarian ethos dates back to the late 18th century when John Anderson, the founding father, set out in his will a vision of a new democratic university with part-time education for non-traditional students, including artisans and women – “a place of useful learning” – now the University motto. Through public subscription, the John Anderson University came into being – now the University of Strathclyde.

Inclusivity and community outreach have characterised the development of the institution. By the mid-eighties, the university embraced the Learning in Later Life (3L) idea based largely on the University of the Third Age. As it was the first targeted 3L programme in Scotland, it gave birth to a wide-range of teaching, research and practical activities targeted to the needs of older adults. The flourishing 3L programme was formalised by the institution as the Centre for Lifelong Learning (CLL) in 1996. A broad range of public programmes were offered including languages, history, the arts, and natural and social sciences at all levels geared towards the needs and interests of older adults.

Currently, around 1,500 learners aged over 50 are enrolled in targeted programmes. The learning programmes are wide-ranging and flexible, with a great many other non-formal activities through self-help clubs and groups. On-going support and encouragement is also provided for teachers and tutors through non-formal training and workshops, especially addressing how to develop better ways of learning.

Not only was the initiative the first in Scotland, but it also remains one of the largest and most sustainable in Europe. CLL staff are often asked to identify the factors contributing to its sustainability, and three

aspects have emerged. These are linked to the collaborative nature of the venture involving partnerships both within and outside the university in the development and delivery of programmes, support from the University for the work of CLL at the highest level and most importantly the engagement of older students in decision making and in the development of extra-curricular activities, some of which are discussed below.

The Centre, since beginning, has developed initiatives that cultivate the context for the creation of the AFU concept and principles. Four arenas for innovative practices for older adult learning follow.

First, the programme offers bridges between generations enabling young people to learn from therein seniors and vice versa. The intergenerational contact has been useful in promoting new images of both older and younger people, placing young people at the forefront of challenging ageism.

Second, the Centre targets older adults in the 50-59-year-old age range recognising the burgeoning older adult population, in part brought about by employer restructuring and downsizing. For example, one-day workshops were developed, half-day taster seminars, study trips, summer courses and lunchtime talks. Skills-based classes – especially information technology – have expanded exponentially, both for personal enrichment, and also for work readiness. An overall uptake of optional university credits has also demonstrated that some students wanted official acknowledgement, while others have seen these as enhancing job opportunities.

The third hallmark of Centre development is that older adults have been integrally involved in defining its offerings. Despite the sociable nature of classes, it is the personal connection to each other that enhances the experience. Tutors are engaged for three hours per class, two for teaching and a third for social interaction. Over refreshments in a pleasant room, tutors and students mingle. This strategy enables barriers to be lifted and enriching relationships to thrive. A 3L Students Association (3Ls) was formed in 1998 and has a current membership of over 900. It organises social events including lunches, theatre trips and study weekends. It also supports 16 special interest clubs, which are open for those registered in the programme and who are student association members. It works in parallel with the classes to ensure formal learning is supported by informal activities. Furthermore, it helps to integrate students into university life with members encouraged to take part in other events, such as university public lectures, intergenerational debates, concerts and art exhibitions. This involvement has raised the 3L student profile throughout the university, as well as engendering a sense of belonging to university.

Fourth, a host of older adult volunteer groups have been created to carry out the Centre's mission. Exemplars include: University Guides (campus tours), Computer Buddies (one-to-one learning) and the Spinal Injuries Support Network (social support). These projects have allowed students to apply their learning and to benefit the community. "50+ Challenge", set up in 1997, supported students in their search for paid employment. One-to-one mentoring, help with CV writing and interview skills were supplemented with study for the European Computer Driving Licence. Over the years the Centre has built considerable expertise in older adult employment, which is of increasing relevance.

Fifth, pathways have been built to facilitate older adults' sense of belonging and access to university facilities. Such engagement has contributed to the programme's success through the range of informal activities running in tandem with the volunteer projects. The work done over the years includes mailing promotional material, assisting at open days, staffing exhibition stands, community group talks, conference registrations, cataloguing books, hanging art exhibitions – and not least, welcoming visitors and new students to the Programme.

In line with the AFU's mission, the Centre has broadened its mission in two significant ways. First, it has built significant expertise in employment and skills related training to encourage older adults to improve career prospects. It has worked with employers, trade unions and other business organisations to explore productive and flexible ways of integrating and maintaining older adults in the workforce. Additional funding from the local authority and the European Union has largely supported these programmes.

Second, pathways have been developed for engaging older adults with the university's research agenda. Older adults are now engaging in research that will *a*) inform the university's ambition to provide more responsive programmes for older people and *b*) inform public policy makers about the educational needs of older people. An initial task was to prepare a historical record of the growth of provision for older learners over a 25-year period, to review existing provision and make recommendations for future development from the perspective of these older learners. The research, all conceptualised and executed by older adults, has informed the development of many university projects on inter-generational learning and on the potential for older adults (grandparents and other community members) to contribute to children's learning. This

new departure provides a way for learners to identify their own learning needs and provide evidence on what works.

Today the importance of learning in later life is now recognised as an integral part of the mission of the University of Strathclyde in its quest to enhance and promote active healthy ageing. It is also seen as an integral part of the university's strategy to widen access through encouraging older people from all backgrounds to engage in formal and non-formal learning within a university context.

II.4

Case Study 2: Dublin City University

Dublin City University (DCU) is a young university with a distinctive mission, which aims to «transform lives and societies through education, research and innovation» (<https://dcu.ie/agefriendly/index.shtml>).

DCU has responded to global challenges posed by demographic changes by becoming an “Age-Friendly University”. In this, the university has built directly on its existing track record of research, educational innovation, widening access and community engagement in areas such as intergenerational learning, innovative delivery of lifelong education, health and wellness, social enterprise, support of non-traditional learners, careers, business and technology.

The AFU concept moved the university to a wider, strategic focus, incorporating the needs of older adults into the development of new opportunities and synergies locally, nationally and internationally. Under the auspices of the University President, a university-wide, interdisciplinary working group was established with the brief of engaging directly with older adults and their representatives to identify ways in which DCU, and higher education more generally, might best contribute to meeting their interests and needs: short, medium and longer term. Those involved included older adult learners from DCU's long established Intergenerational Learning Programme (Corrigan *et al.*, 2013) and major agencies such as: Age Action Ireland, Age and Opportunity, AONTAS – the (Irish) National Adult Learning Association, the Senior Citizens Parliament, the Retirement Planning Council of Ireland, the Third Age Foundation, prominent experts (e.g. a social-gerontologist), U3A (University of the Third Age), various active retirement associations, representatives of the university's own retired community, and relevant public authorities.

In 2012, as DCU launched AFU and incorporated the ten principles into its mission. A subsequent Age-Friendly Implementation Action Team was established representing six “Pillars” of areas of work across the university: 1. Research and Innovation; 2. Teaching and Learning; 3. Lifelong Learning; 4. Intergenerational Learning; 5. “Encore” Careers and Enterprise; and, 6. Civic Engagement. This work was supported by the coherence of core strategies of DCU relating to educational innovation, widening access, civic engagement and research.

From a myriad of areas of development at DCU, four are highlighted here as illustrative of the range encompassed under the AFU concept. First, life-long learning was further developed through the offering of flexible learning programmes (part-time or e-learning particularly at the postgraduate level), which address current research, identifying the challenges faced by relatively younger adult students (30-50s) engaging with full-time study (Slowey, Murphy, Politis, 2014). For example, DCU is host to Ireland’s National Centre for Digital Learning. Also, DCU in the Dublin community offers shorter programmes targeted particularly at widening access to adults who did not previously regard higher education as “being for them”. Arguably, however, at the core of provision for older adults lies DCU’s Intergenerational Learning Programme (IGLP), which is directly centred on the identified needs and interests of older learners. This is done not in isolation, but in close collaboration with younger students with an educational approach designed to encourage each to learn from the other (Corrigan *et al.*, 2013).

Second, DCU has taken a lead in research on implications of specific aspects of ageing. For example, DCU has set a major focus on early onset dementia, getting involved with EU projects such as In-MINDD (innovative midlife intervention for dementia deterrence) and an Elevator Project supporting awareness raising and training in relation to dementia.

Third, DCU has developed programmes around health and wellness. DCU hosts a MedEx programme, which under the care of a medical director, brings several thousand older adults to the DCU campus for a wide range of programmes aimed at supporting healthy living including: HeartSmart – cardiac rehabilitation; BreatheSmart – pulmonary rehabilitation; SmartSteps – vascular rehabilitation; Diabetes Health Steps – diabetes; Move On – cancer rehabilitation; and, Living Life – for people living with advanced/secondary cancer.

Fourth, DCU works to continue its collaborative research investigating learning among older adults. The use of innovative technology for learning holds potential for older adults who can be otherwise excluded from

learning activities due to physical and social barriers. Working in partnership across a range of disciplines (e.g. technology, adult education, communications) and with other researchers internationally, Universal Design for Learning (UDL) explores the use of multiple representations of information through alternative modalities to create new interfaces to support older adult learning (Murphy, 2015).

11.5 Conclusion

Experience shows how higher education institutions not only need to consider alternatives to their many systems geared towards full-time students, but they also must look outside of many conventional benchmarks which fail to capture the rich and diverse activities encompassed within the vision of the AFU. Additionally, there are challenges in discovering the types of learning which many older learners seek as opposed to prescribing how they should learn (Kolland, Ludescher, Waxenegger, 2016). Universities are well placed to become leaders in addressing these challenges. The illustrations we have provided of AFU activities are, we suggest, building blocks, which are both relevant and correctly targeted at promoting the quality of life of older adults. They are firmly based on a partnership approach involving teachers, researchers, community organisations and learners working together in the delivery of programmes. Along with age-friendly initiatives in related areas (such as health and wellness, urban development, technological innovation and cultural activities), they are all part of what might be an AFU trajectory.

Achieving a university that is age-friendly in practice would require nothing less than a cultural transformation for most higher education institutions. The challenges are clearly considerable for institutions with an educational mission centred on young adults. Experience suggests that there is much to be gained from even taking the first step of opening discussion and debate involving all interested parties. In these debates, the diverse voices of older members of our communities have an important role to play in bringing us back to central questions concerning the role of universities in contemporary society and issues of access to higher-level knowledge. The possibilities for mutual learning, dynamic development and innovative outcomes are considerable.

Ageing-Friendly Economy and Labour Market for Seniors in Ukraine

Alina Khaletska

12.1

Introduction

In the article the urgent problem of involvement of seniors in rational employment has been investigated. The modern trend for ageing-friendly economy and labour market formation for seniors in Ukraine as a challenge for demographic policy has been analysed.

Today in Ukraine the development of an ageing-friendly economy and labour market is more declarative than practical. However, society needs the concept and strategy of building a future for the country with indicated prospects of attracting seniors to active economic life. This approach is very different from the current trends for seniors who have often been discriminated against in their right to work. This abstract is the author's attempt to ground the necessity of formation of the labour market that provides legal and economic support measures to ensure implementation of constitutional rights of senior people as well as their motivation to work.

12.2

Theoretical and Practical Approaches

Mostly theorists of ageing have taken different approaches to the basics of employment opportunities for seniors, in particular:

- Theory of disengagement, which means on retirement seniors have been separated from society and this separation (alienation) has become an adaptive mode for them (Rosen, Neugarten, 1960) and Cumming and Henry (1961).
- The theories of “useful” or “successful ageing” (Rowe, Kahn, 1987), that prove that in its perfect representation old age “should be” similar to

the middle age of a man. If not, this period of life can be considered an unhealthy deviation from the norm. The best policy for the elderly is to stay active as much as possible. The level of activity in the elderly is caused by lifestyle in younger years, especially under conditions of conscious maturity and depending on the individual characteristics.

– Scientist and gerontologist Ian Stuart-Hamilton in his famous *The Psychology of Ageing* wrote that the level of active ageing and the way a senior in his 80s meets the challenges of life have been determined by his personality and way of living in his 40s (Stuart-Hamilton, 2012).

– Theory of healthy behaviours, seniors' integration, means the need for an active role of the elderly in society, activation of their vital resources (Moorman, Matulich, 1993).

– Theory of structural dependence (i.e. dependence and poverty of older people are explained with their limited access to material and social resources of society) as well as the theory of subculture of ageing (people taking easier transition to old age if they are attached to the subculture of elderly) (Rose, 2004; 2007).

More specifically, researchers have dedicated themselves to challenges for social and economic development that lead to demographic ageing, in particular:

– Spatial and temporal global demographic ageing.

– New nature of ageing (ageing process that progresses not through reduced fertility but mostly through the inertia of the dynamics of age structure and longevity).

– Situation in post-socialist countries (low birth rate, not enough high life expectancy).

Practical studies prove that modern Ukrainian society needs modernising of its socio-economic sphere. According to the World Bank, Ukraine has one of the worst demographic profiles in Europe. Today in Ukraine there are many obstacles for older people to participate in economic, social, cultural and political life. It was outlined by the government that implementation of strategic socio-economic reforms for improvements of the education system, in particular the quality and availability of lifelong education is of vital importance for Ukraine. The formation and dynamics of these changes in Ukraine can be characterised by synchronisation with the EU policy of social inclusion and active participation of seniors.

Ukraine is characterised by its ageing population, which has become a nationwide trend. According to the demographic forecasts for Ukraine the highest level of ageing population is expected in the 2050s (people aged

over 60 years old are expected to be 21.7 per cent of the total population, in particular women – 26 per cent, men – 16.8 %). The most senior adult population in the country is rural women (the proportion is 19.1 for urban areas and 26.1% for rural ones). There is also a distinct regional differentiation of the demographic situation in Ukraine caused by geographic, historical, economic and political factors, in particular with different structures of production, regional differences in quality of life, specificity of labour markets, differences in lifestyle of rural and urban population (especially in metropolitan areas), dynamics of migration, urbanisation trends, etc. According to the forecast, in 2061 the proportion of young people in the population of Ukraine will be 14.9%, and those aged 60 years and older, 31.2% (in 2013, 21.4%). In conditions of increasing the retirement age, reducing the traditional distribution schemes, providing “unpopular” pension reforms there is a need for practical research for balance between employment and retired life (<http://www.idss.org.ua/>).

This paper aims to introduce the approaches of formation of an ageing-friendly economy for seniors as the way to positive changes in the demographic policies in Ukraine to adapt society to the ageing population.

12.3

Analytical Framework

12.3.1. WORKING AND PENSION AGE POPULATION: STATISTICS

A demographic profile in Ukraine shows that the proportion of people in pension age is over 24%. Economic burden on the working population – 411 persons/1,000, while the overall rate of economic activity – 723 dependents/1,000 persons of working age.

The number of contributors to pension insurance is 15.2 million, number of pensioners – 13.8 MM., i.e. 90.8% of the average pension is financed. The share of pension expenditure of GDP is now 15% and the fiscal burden on taxpayers' premiums remains the highest (33.2% for employers and 2.5% for employees). If in 1966 the share of the population of retirement age was 15.9%, in 2006 this figure had increased 1.5 times, and by 2046 it will increase to 35% of the total population of Ukraine (<http://www.mlsp.gov.ua/labour/control/uk/index>).

The average scenario made by the Institute of Demography and Social Studies named by M. Ptukha from the NAS of Ukraine proves that

in 2061 in Ukraine the elderly loading to working age population (65+/15-64) will increase from 22% to 45%, the potential support factor (15-64/65+) will decline from 4.6 to 2.3 (on international standards). Moreover, the Ukrainian reality proves that a narrowing of the age range to 20-59 years is expected. As a result, the elderly loading to working age population (60+/20-59) that now stands at 36% will increase to 65% by the end of the forecast period and the rate of potential support (20-59/60+) will decline from 2.8 to 1.5 (<http://www.idss.org.ua/>).

Besides there is a trend for rising pension costs (because of increasing the retirement age, reducing the traditional distribution schemes, the calculation of pensions and other “unpopular” reforms in the social sphere).

The increase in pensioners’ contingent and reduction of the number of employed taxpayers have a negative influence on the pension system and the quality of life of pensioners in Ukraine. On the one hand, the problem lies in the availability of employment opportunities for pensioners, and on the other – in the growth of unemployment in society.

The approach to the involvement of seniors in rational employment can be realised through the development and implementation of the integrated system of recovery of labour potential. This is based on the targeted system that allows applying seniors to the labour market and restoring their professionally important qualities, and bringing about the adaptation of tangible and intangible external factors that affect the integration of seniors. The system of lifelong learning is to be adapted to the requirements of multiple markets of different specialties, and the future requirements of the labour market can be taken into account beforehand because of the large inertia of the system of training and retraining. The challenges for the formation of the labour market for seniors are in economic recovery, medium and small business development, re-launching the economy in an ageing society, cross-sector cooperation for new job infrastructure, digital economy, smart citizenship, etc.

12.3.2. AGEING-FRIENDLY ECONOMY: CONTEXT

The situation that has developed in Ukraine today is hardly conducive to enforcing the provisions of the basic concept of an “ageing-friendly economy”. It could be explained by the following stereotypes:

- *Senior generation.* Negative characteristics reduce its value in the life of society. Concept of “successful ageing” (low probability of disease or disability, high capacity for learning and physical activity, active participation

in society) does not “work” in Ukraine mostly because of the influence of two groups of factors: firstly, the overall situation in the country (the level of socio-economic development, political system, environmental conditions, traditions, mentality, etc.); secondly, factors that depend mainly on each individual person (his/her individual characteristics, lifestyles, past experience, willingness/unwillingness to maintain social relationships with people in younger age groups, etc.) (World Health Organisation data).

– *Social exclusion.* Basic Convention of the International Labour Organisation “Discrimination (Employment and Occupation) Convention No. 111” (1958) proclaimed the fight against discrimination, the principle of non-discrimination in the workplace (Convention concerning Discrimination in Respect of Employment and Occupation, and coming into force on 15th June 1960). In the Labour Code of Ukraine under Article 2-1 ensuring equality of labour rights regardless of any circumstances, it has not been regulated that age is a factor of discrimination. Though in Ukraine there are no trade unions for the elderly, which would provide them with the opportunity to create an organised force and influence the development and implementation of programmes and strategies that directly relate to their interests.

– *Age discrimination.* In modern community in the workplace it has become so popular that the age discrimination scale is approaching gender irregularities. In the European Union, 58% of respondents believe that in their country there is age discrimination. Women constitute the majority among persons who have not acquired the right to retirement pension or the amount of such pensions is significantly lower than for men. Analysing the problem of ageism, there are two more vulnerable categories of workers who face discrimination at work – young people and senior groups. It is a stereotype that older workers “take” jobs away from young people. Studies from the OECD show that the employment rate of older people is positively correlated with the level of youth employment, that older workers do not restrict employment opportunities for young people.

– *Labour market.* There is a correlation between older workers and forms of price competition in the labour market, i.e. having retired for a second source of income, senior workers easily agree to work for lower wages actually dumping the cost of labour. In addition, older workers are often less demanding about the nature of work and working conditions, filling a niche with jobs that do not attract young or middle-aged people.

– *Phenomenon of the age polarisation of the labour market.* This means that employment of older workers is concentrated in low-productivity sectors with low salaries or harmful or adverse conditions. Politicians and scientists debate about the role of older workers in the economy and the labour market in conditions of a global financial crisis. In particular, many EU countries are going to reduce the number of jobs on the labour market, and an unemployment restraining mechanism involves earlier retirement schemes.

Besides, it is necessary to take into consideration subjective peculiarities of the senior age. According to French psychologist Charlotte Buhler there are five phases of personal development and the last of them “ageing” begins at 65-70 years (Alperovich, 2004). This scientist believes that at this stage many people are no longer interested in achieving the goals that they set for themselves in young ages. Seniors keep themselves self-conscious and can choose the way of life they like. But this choice can be positive or negative depending on the type of personality and life circumstances.

The well-known psychologist V. Henry identified three groups of elderly based on a criterion for the presence of “mental energy” in particular:

The *first group* includes those people who feel quite cheerful and energetic, continue to work, have certain responsibilities in the family and at work.

The *second group* includes people who are not employed, do not perform regular duties in society and deal with personal affairs, and exercise their hobby. These people have enough energy to be employed.

The *third group* includes people with weak psychological energy who do not work and do not implement other forms of employment.

Labour employment of seniors has both explicit and implicit implications. The ability to provide them financial support is the most obvious consequence of employment (among others).

Studies show that seniors consider their job more attractive than young men. In the period before retirement a person becomes more anxious and loses self-confidence. There are a number of reasons, which make the relationship of a man to retirement: the desire to stop working or to continue working; the arrival of a new, younger employee; poor health; financial capacity of the person. In any case, lifestyle changes cause a need to find new employment, a new social circle adapting to a new social status (Ilyin, 2012).

Famous scientists Eckerd and Thompson believe that adaptation to the retirement phase of life is better when (if) the person is preparing

ahead for a new cycle of life. Preparing for retirement, according to researchers, consists of three elements: a gradual reduction of the number of duties; planning for retirement and retirement itself (Ilyin, 2011).

But social perceptions and behaviours have been changing slowly.

Undoubtedly the state could also favour labour market opportunities in Ukraine, but today the government mostly sets requirements.

On the one hand, the importance of using the employment potential of older people is growing especially because of the reduction of the number of the working-age population. Fewer generations enter the labour market and start their working careers compared with the number of generations retired and leaving the labour market. The increase in life expectancy of healthy people under their sixties enforces their ability to work and their employment potential as a valuable resource for production growth.

On the other hand, this requires additional training or retraining that becomes economically disadvantageous for employers because of the additional costs incurred.

12.3.3. AGEING-FRIENDLY ECONOMY: EMPLOYMENT OPPORTUNITIES

In the economic sphere enhancing retirement income needs:

- Creating the conditions for the training and retraining of senior citizens, for instance: centres/programmes for the retired “How to launch a business on-line”, provide e-start-ups for adults in ageing-friendly industries, create new job infrastructures: small businesses for the elderly (freelance opportunities, “work.ua” platform for seniors, etc.).
- Promoting employment of retirees through tax and other benefits to commercial and public organisations in recruiting retirees, for instance: improvements of joint activities with employment agencies and services to facilitate and mainstream employment of pensioners aimed at their skills’ upgrade and new skills: “Guide/Programme for Large, Medium and Small Business Owners”, “Pre-pension schemes for staff”, “How to Start Business On-line”: the EU’s best practices for Job Growth and Investment”, as well as facilitating White Book “Cross-sector Cooperation in Re-launching Pension Schemes/Programme in Ukraine: SMEs for the third age”.

These could be aimed at the goal of economic recovery; medium and small business development; re-launching the economy in an ageing society; cross-sector cooperation for new job infrastructures; digital economy: supply and demand equilibrium on the labour market for seniors.

12.4 Conclusion

In view of the aforementioned, it has been mentioned that the increase of high employment potential of older people in terms of demographic ageing will lead to economic challenges, in particular: the availability of the labour market; motivation of economic activity; the “profile” of employment; coverage of pension benefits and risks of poverty; reducing inequality, harmonising the interests of various age groups; broadened lifestyle range of interests, social connections; ability to view old age limits and raise the pensionable age.

Older workers have important advantages such as: the foundation of their competitiveness in the labour market, skills, practical skills, experience and maturity.

They often demonstrate a commitment to their work, rarely take sick leave and spend more time at work.

Besides, an ageing-friendly economy will bring benefits by minimising threats of labour shortages caused by demographic ageing that cannot be fully compensated by involving migrant workers or outsourcing, as well as measures aimed at stimulating the birth rate which have a very limited effect.

Under these conditions, increasing the economic activity of senior people is the most promising area of demographic, economic and social policy in Ukraine.

Physiological Basis of Storage Longevity in the Sport of Elite Athletes of Various Specialisations

Gaik Aleksanyants, Svetlana Pogodina

13.1

Introduction

Intensive development of professional sports in the case it is an alternative income source favours the emergence of highly qualified athletes in their forties (both male and female) at the sports arena. At this age, the involuntary age specific processes take place (Beneke *et al.*, 2011; Hirshoren *et al.*, 2002; Pogodina, Aleksanyants, 2015). These circumstances make the problem of quality, functional monitoring of athletes of that age group actual, as well as the comparison between their functional status and that of relatively young athletes in order to reveal the physiological factors that act as a basis of forming and supporting the functional state of those who age actively (Crewther *et al.*, 2015; Lazovic *et al.*, 2015; Macut *et al.*, 2015; Pogodina, Aleksanyantz, 2016; Zinchenko, Aleksanyants, 2015).

The purpose of this article is to study the functional status of highly qualified athletes of different age and sex.

13.2

The Methods and Organisation of Research

Highly qualified male and female athletes of junior, of the first and second mature ages were examined. The athletes do the kinds of sports that aim at the development of aerobic stamina (swimmers, cyclists, long distance runners – “stamina” group) and speed-force stamina (weightlifters – “strength” group). The female athletes were divided into groups in accordance with the character of their menstrual cycle (MC) – with ovulatory menstrual cycle (OMC – aged 16-26) and an ovulatory menstrual cycle (AMC – aged 37-35). Eight research series were held (4 for males and 4 for

females) aimed at studying basic adaptive mechanisms that determine the functional status of athletes (FIG. 13.1).

The research was held in standard conditions of veloergometric test of incrementally increasing load implemented during at least 5 minutes in the following working modes (W): aerobic (regenerating) W₁₋₅₀W, heart rate 150-160 beats per minute), aerobic-anaerobic (developing) W₂₋₁₀₀₋₁₂₀W, heart rate 150-160 beats per minute), anaerobic-aerobic (W₃₋₁₅₀₋₂₂₀W, heart rate 170-185 beats per minute). As a specific load test for swimmers "a distance swimming test" was used. In it different modes of swimming were modelled by using distances of different intensity and duration: aerobic mode – heart rate 130-140 beats per minute, duration 1 hour 30 minutes; aerobic-anaerobic mode – heart rate 150-156 beats per minute, duration 21-23 minutes; anaerobic-aerobic mode – heart rate 170-190 beats per minute, duration 11-12 minutes. Specific load test for weightlifters was implemented by muscle-strengthening exercises "weight snatch" which was done lasting 10 minutes. The working modes were modelled by the change of the weights: 16, 24, 32 kg. The female athletes' characteristics were studied in different periods of their menstrual cycle. Statistical treatment was held using Student's t-test, Wilcoxon t-test, Mann-Whitney U test, correlation analysis. Significant differences were estimated at $p < 0,05$.

13.3

Results

The research of hormonal functions revealed a tendency to enforce the glucocorticoid reactions of male athletes who demonstrated weakened reactions. In the groups of athletes of junior and first mature age the enforcement revealed at high liminal levels of load. At the second mature age the liminal load, at which the production of cortisol was noted, was becoming lower, and in the "strength" group in the circumstances of specific work the excess growth of cortisol production in the initial condition was noted. That is, with ageing the enforcement of glucocorticoid reaction was noted at the low liminal levels of load.

The gender specificity of hormonal reactions was connected with their weakening in inter-menstrual period. Its enforcement was noted at lowering the level of estrogenic saturation in menstrual \ and pre-menstrual pe-

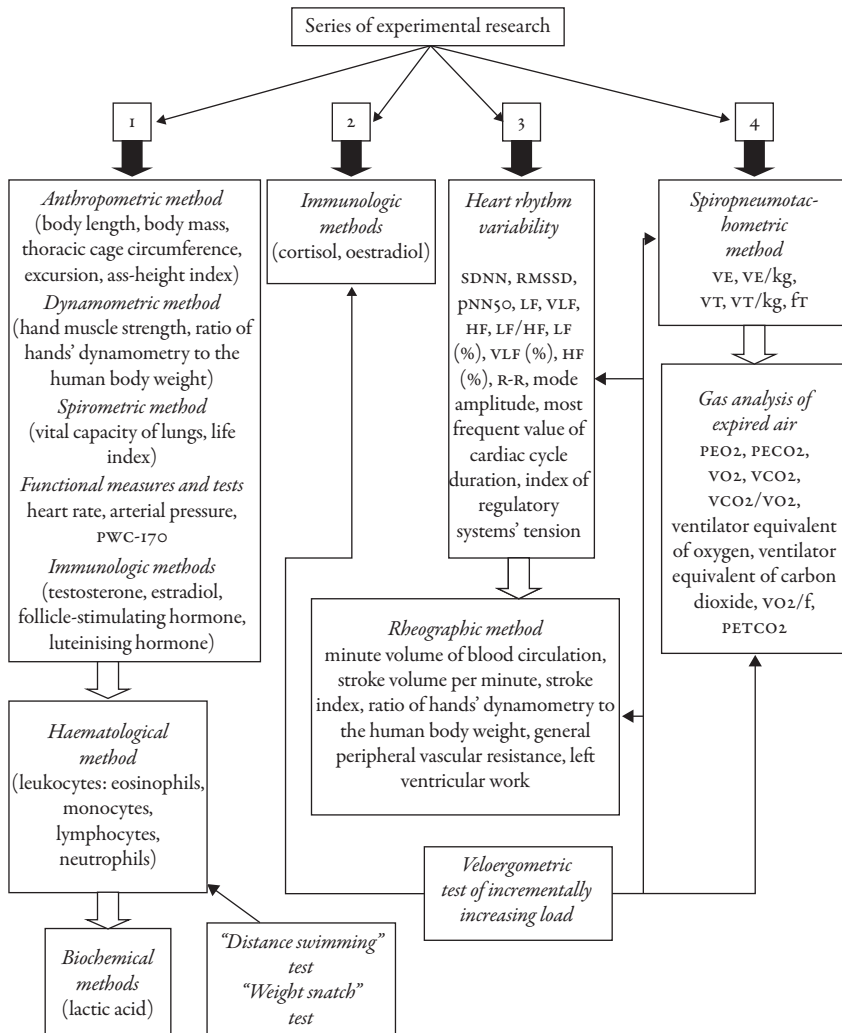
riods, This means that the glucocorticoid reaction of female athletes was co-related with the level of estrogenic saturation.

The results of the research of metabolic mechanism adaptation demonstrated that the highest growth of lactic acid production was noted at specific loads implemented in anaerobic-aerobic mode at the junior and especially at the first mature age. At the second mature age the growth of lactic acid production was noted at a comparatively low level of load – in the conditions of aerobic-anaerobic mode. In the age group of female athletes with OMC a considerable growth of lactic acid production proportional to the growth of the liminal modes of load was observed. Meanwhile, the lactic acid production of female athletes with AMC grew at low levels of load.

The study of non-specific mechanism of adaptation and the analysis of the leukogram made it possible to witness the formation of higher activation reactions of male athletes of the junior and second mature age; this is connected with a great influence of humoral factors on the activity of non-specific mechanisms. Alongside it, in the first mature age at the greatest activity of humoral factors the reactions of calm activation are noted, which means high stability of homeostatic mechanisms. The reactions of calm activation and training are defined in female athletes' organisms. Consequently, humoral factors have a relatively weak impact on female athletes' organisms which also has an effect on the weakening of the endocrine and non-specific mechanism of reactivity.

The research of the functions of cardiovascular system and the vegetative regulation of cardiac rhythm in particular revealed specific peculiarities of vegetative reactivity to the load in anaerobic-aerobic mode which were presented by credible lowering of parasympathetic impacts in the "strength" groups with a significantly greater shift for juniors. The described regulatory shift conditioned more prominent evidence of the proportion of heart rate in the increase of the minute volume of blood circulation which was more than 150% for juniors. In the first mature age the proportion of heart rate in the increase of the minute volume of blood circulation became low while in the second mature age it grew. In this age the "strength" group also witnessed a credible growth of the tension index up to 239 standard units. The peculiarities revealed witness the growth of reaction of the cardiovascular system to high liminal load of the "strength" group due to lowering of activity of autonomous mechanism which is clearly presented in the second mature age and requires an operational control of the functional state of highly intensive loads.

FIGURE 13.1
Methods and organisation of research



The chrono-biological peculiarities of the nervous regulatory influences on the heart rate were observed in the female athletes' age groups. A vegetative reaction was revealed to the load connected with the growth of power values of high-frequency waves and the lowering of power values of waves of ex-

tremely low frequency in the OMC dynamics in the 8th-16th day period and in the AMC dynamics in the 20th-22nd day period which witness the enforcement of the autonomous regulation contour and the weakening of the central one and which is the temporary criterion of the most favourable variant of regulation of the heart rhythm in the female athletes' groups. The quality of haemodynamic reactions is similar to that of the vegetative ones. Positive inotropic effects and the growth of external cardiac performance were revealed in OMC in the 8th-16th day period and in AMC in the 20th-22nd day period.

The research of the respiratory mechanism of adaptation revealed a relatively high reactivity of respiration system at all levels of liminal work modes in the "stamina" age groups. However, reactivity was highest in the first mature age. In the second mature age a relative weakening of ventilator reaction was demonstrated at a high liminal load level. The highest level of ventilator reaction was defined in the junior age. Effective ventilator equivalents in breathing pattern were demonstrated at all steps of load testing in the junior and first mature age. In the second mature age high effectiveness of the breathing pattern is supported at relatively low liminal load modes. In the "strength" group the highest reactivity of the respiratory system is also revealed in the first mature age. At high liminal load levels, the drop of the effectivity of the breathing pattern was defined in all "strength" age groups. The lowering of the reactivity of the respiratory system was demonstrated in the second mature age thus forming the conditions for the drop of ventilation effectiveness – the growth of ventilator equivalents, lowering of the level of delivering oxygen to lungs. Thus, in the second mature age the weakening of breath reactivity leads to lowering of the effectiveness of breathing patterns which is mostly revealed in the "strength" group.

In the female athletes' age group with OMC in the 13th-16th day period the following was noted: an evident enforcement of ventilation and gas exchange, prevailing of oxygen consumption intensity and a rise of the oxygen value of the respiratory cycle. The period of 8th-9th day coincides with the largest increase of carbon dioxide release intensity. In the AMC dynamics, the largest increase of the ventilation of lungs while working with intensity characterises the period beginning from the 20th-22nd day and is accompanied by a prevailing increase of carbon dioxide, the rise of ventilator equivalents, lowering of delivering oxygen into lungs. That means that achieving high values of haemodynamic parameters by female athletes in these periods occurs with tense respiratory functions.

The guidelines of the research of physical development characteristics revealed the shift of values of total and partial body sizes and integral indexes

in the “strength” group characterising the reserves of oxygen transporting systems in the zone of the value scale of their relatively low functional level in relation to the “stamina” group which was especially expressed in the second mature age. The significant correlated interconnections revealed between the body mass values and the maximum consumption of oxygen in the “strength” group witness the influence of morphometric shifts on functional changes.

In the female athletes’ age group with AMC the growth of the thoracic cage motility and the life index lowering were revealed. The negative correlation of life index with the values of the thoracic cage expiratory circumference witness that that functional shift was conditioned by the growth of the metric parameter mentioned which evidently rebuilds the working scheme of the respiratory apparatus and forms the conditions for the hyper kinetics of the ventilator response and the change of the structure of the vital capacity of lungs.

The integral assessment of the adaptive reactions made it possible to build conversion models of functional abilities of athletes of different age and sex. The model of the first mature age underlines a greater intensity of conjugate enforcement of adaptive mechanisms which witnesses the growth of reaction to high liminal influence in comparison with the previous age period. The model of the second mature age reveals the weakening of reaction at high liminal influence, in particular at the level of respiratory and metabolic mechanism. Along with the tendency mentioned, an excess enforcement in the regulating mechanisms – vegetative nervous and hormonal – in the “strength” group is revealed, and this makes the functional abilities of these athletes considerably low.

The systematisation of chronobiologic changes of the level of functioning of main systems in the female athletes age groups made it possible to differentiate regulatory factors determining the differences in the most favourable time periods of OMC and AMC to reveal high functional potential of oxygen transport systems.

13.4 Conclusion

Sex and age specific algorithms of conversion of the level of functional abilities of different liminal load modes can be used while forecasting the adaptive abilities and functional status of highly qualified athletes of different sex and age.

Education of the Third Generation Makes a Person Necessary for Society

Mutallim Rahimov

14.1

Introduction

In Azerbaijan specialists that meet the permanent demands of the labour market are needed. The cadres that are lacking especially in the field of oil and gas refining, high technology, information and communication technology and programming in our country have been invited from foreign countries to try to fill this gap. We may say that all the engineers who work for oil companies in our republic are foreign citizens. Though the youth that receive education abroad are enlisted in this field, it is noticed that adults are not able to work there. We can also talk about other fields in which contemporary technology is applied. Demands for specialists in new fields turn adults away from society, because they do not meet the demands of the day and become older.

In the globalising world, knowledge and information are changing rapidly, one education is not enough and does not provide development throughout life. Even most knowledge received in the most perfect education system loses its importance after a while when the education process is over.

14.2

Adult Education

To take an active part in the economic, social, cultural and political life of a society that is permanently updating, becoming rich and adapting to the demands of today's knowledge, skills and personal qualifications of the older generation in terms of quantity and quality have become important.

If we take into consideration that according to the idea accepted in the world that every year 20-30% of knowledge, skills and occupations are getting older every 5-8 years, it shows how huge the problems that adults encounter are. That is, the only way out from this situation in the future is to involve adults in education. Because education is a field that teaches how to make a good decision in any situation in our life. Azerbaijan has chosen a development way like that, so there is no need to prove how significant it is for Azerbaijan. Because otherwise a large, social society fulfilling the function of carrier and distributor of performing training, education, ethics and moral values would be isolated from society.

In this case, national properties can completely melt in the process of the common values of globalisation while degradation and weathering processes go fast and gradually national features disappear. Moreover, isolation of society brings them face to face with moral, social, psychological, legal and financial difficulties and problems. In the end, they cannot find other options but to be considered unnecessary entities for the community and others. And this would mean the destruction of the spiritual and physical condition of adults.

«The ultimate aim of education is not to accumulate knowledge but action» – said C. Hibben former president of Princeton University in the United States. It is evident from this saying that accumulating knowledge is not an aim, it is a tool; the aim is application of knowledge in life practice and movement. Indeed, Mr. Hibben was right that he said education increases dynamics of adults and turns them into society as active persons. Another important problem in Azerbaijan is the legislation that considers removing employees forcibly who reach retirement age.

If we take into consideration that retirement age for women is 60 and for men 63, legislation automatically prohibits those who reach retirement age to work in the civil service and other positions, as well as in the public health and education system. Thus, in our society there appears a large army of unemployed and isolated people. They have to adapt to and work to provide companies or live alone by themselves as isolated beings. Not involving adults in the education system in the adaptation process causes not gaining new knowledge. And this cannot be considered a normal case. Because «the aim of education of adults is to form citizens to be able to grow the society at the level of needs of the age and preserve our national benefits» (Mammadzade, 2005).

Adults begin a new education process when they want and need it. An adult makes decisions him/herself, regulates his/her life, chooses op-

tions him/herself. Foreign motives are of secondary importance for adults, sometimes their roles reduce to nought. On the contrary, for them inner motives of activity and comprehension of significance of the teaching material are highlighted.

This option of adults makes for certain difficulties in training. They do not want to attend lessons or they leave lessons when they are not thought equal. It has become possible to observe this case in the courses organised for adults at Baku Eurasian University (we should note that adults are people considered of age of more than 50). They must believe and be confident that the education they gain will become beneficial for their near future activities. Otherwise, they do not want to spend time on that.

14.3

Economic Impulse for Adult Education

There are numerous factors affecting the education of adults. This list includes unemployment, a number of retired people and adults who receive lower wages want to convert it into a modern job by which he/she can get higher wage. According to the State Statistics Committee, the case of 1st January 2016, the number of economically active people in Azerbaijan amounted to 4915.3 thousand persons, this list includes 4671.6 thousand persons of the population engaged in labour activity. On 1st January 2016, the number of persons given the status of formally unemployed by the employment agency in the country was 28.9 thousand. But, in reality, this number is higher, because the unemployed who are not registered are more. The average amount of unemployment benefit totalled 262.3 manats.

On 1st January 2016, the number of retired people was 1,295,900 (<http://olaylar.az/news/sosial/156034>) and the average pension amount was 176.03 manats, and the average monthly amount of old-age pension amounted to 196.08 manats. It is obvious that the number of officially unemployed (there are many elderly people among them before retirement) and retired people is many more in Azerbaijan. If we compare their benefits and pension today, they are 154 and 115 USD. And this is not a large amount and it can be considered a serious reason that can make those people enthusiastic about working. These people need re-education to be competitive in the labour market that make the problem of education of adults important in the country. The importance of education of the third

age, in other words, this problem is of great importance in terms of the development of entrepreneurship in the country and is also recognised as development and quality based on technology in accordance with civil market traditions because of serious needs for enlightenment.

Economic development, poverty reduction and sustainable educational reforms should raise adult education to the level of priority in the country and turn adult education, which is an instrument for development of human resources, into a strategic direction. Because in accordance with socio-economic development in the country a number of fields have to pass their priority to other fields after a certain period.

Practices in different countries show that while society is developing the needs are increasing and in such a condition on one hand adult education turns into a goal, on the other hand it turns into the object of activity. Development of society defines new priorities for the education system and today one of those priorities is adult education. On the other hand though, the 19th century was characterised as an agrarian society and the 20th century as an industrial society, the 21st century turned into the knowledge and information society. For this reason, the European Union called adult education “one of the keys that opens the doors of the 21st century”. World practice shows that adult education being an integral part of additional education is such an education system that is carried out on the basis of education programmes to provide to adults in order to adapt to the changes in society and economics.

14.4 Conclusions

Every state forms adult education according to the characteristics of its education system.

In this case, proper programmes and educational materials are prepared in accordance with the needs of the society and labour market. Those documents are prepared for everyone regardless of religion, national identity, view, first education and social status, as well as sex (Mehrabov, 2010). At the same time, a number of factors should also be considered during the organisation of adult education. These can be attributed to the following: adult education should not aim to substitute a basic education, on the contrary it should be realised on its basis; adult education must confer on women relevant qualifications to work in pro-

duction fields for males; adult education should pave the way for people who have no vocation and education to get a relevant vocation, all factors that are able to disturb adult education, as well as gaps in the field of legislation should also be eliminated; time between work and education should correctly be determined, fast training methods and technologies that are scientifically justified should be created for adult education; during adult education experience of individual activities should be considered and it should be practiced; the education system should be adjusted to socio-cultural and economic environment, it should be considered that expenditures for education are more effective than those for social life, culture and economics; in development programmes measures connected with adult education should be considered, adult education should be directed and coordinated in accordance with the goals in national-regional socio-economic development programmes; certain discounts should be applied for state and non-state education centres, organisations and communities involved in adult education.

We consider that it is important to define the following basic competences for adult education in Azerbaijan. Those competences may be the following: communication competences in the native language, communication competences in foreign languages, mathematics and technical competences; ICT competences, to learn learning, lifelong learning competences; political and social competences; initiative and entrepreneurial skills, life in multi-cultural society, theoretical and practical comprehension of legal knowledge and competences of comprehension of cultural values.

Though there are different approaches to solving social integration problems of the older generation that are being widely discussed at present, the common opinion is that governments should try to form such a circumstance for the population in the country so that every individual could join the social life of the society and comprehend existing norms and values easily. Serious attention should be paid to adult education to provide this condition in our country, the relevant legislative basis should be created and people in this field should be encouraged. And all these can produce an idea in adults that they are important for our society.

The Travails of the University of the Third Age Movement: a Critical Commentary

Marvin Formosa

15.1

Introduction

The second half of the twentieth century witnessed a proliferation of educational institutions catering exclusively to the learning needs and interests of older adults. The University of the Third Age (U3A), founded in 1973, has become one of the most successful institutions engaged in late-life learning. U3As can be loosely defined as socio-cultural centres where older persons acquire new knowledge of significant issues, or validate the knowledge which they already possess, in an agreeable milieu and in accordance with easy and acceptable methods (Midwinter, 1984). Its target audience are people in the third age of the life course – that is, a life phase «in which there is no longer employment and child-raising to commandeer time, and before morbidity enters to limit activity and mortality brings everything to a close» (Weiss, Bass, 2002, p. 3).

15.2

French Origins (1972-1980)

Following legislation passed by the French government in 1968 which made universities responsible for the provision of lifelong education, the summer of 1972 saw Pierre Vellas coordinating at the University of Toulouse a summer programme of lectures, guided tours, and other cultured activities, for retired persons (Radcliffe, 1984). Surprisingly, when the programme came to end the enthusiasm and determination of the participants showed no signs of abating, so that Vellas was “forced” to launch a new series of lectures for retirees for the forthcoming academic year. Vellas (1997) formulated four key objectives for this new educational enterprise

– namely, 1. raising the quality of life of older people, 2. realising a permanent educational programme for older people in close relational contact with other younger age groups, 3. co-ordinating gerontological research programmes, and last but not least, 4. realising initial and permanent education programmes in gerontology. The first U3A was open to anyone who had reached statutory retirement age in France at that time, and who was willing to fill in a simple enrolment form and pay a nominal fee.

Learning activities were scheduled for daylight hours, five days a week, for eight or nine months of the year. After the programme was marketed on a limited basis, 100 older persons attended the opening session for the 1972-1973 academic year (Philibert, 1984).

Teachers were highly enthusiastic about the motivation and sheer human warmth displayed by older students and marvelled at the way they learnt with new techniques such as audio-visual language laboratories. The first U3A 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 kinds of U3As were eligible to become members (Radcliffe, 1984). The dominant view was that U3As 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 (*ibid.*). 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, p. 28). Indeed, all U3As 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.

15.3

The British Renaissance (1981-1990)

As the U3A phenomenon gained increasing international recognition, it did not escape the attention of British educators and gerontologists. The first U3A in Britain was established in Cambridge, in July 1981, and quick-

ly replicated in other cities and towns (Midwinter, 2004). The British version underwent a substantial change compared to the original French model, with Midwinter (1984, p. 3) going as far as to describe the use of the title “U3A” as «an unashamed burglary of the continental usage». Rather than being incorporated within social science, education, or theology faculties within traditional universities, British U3As embraced a self-help approach based upon the principle of reciprocity, of mutual giving and taking. Self-help groups include people coming together to assist each other with common problems, providing mutual support and an exchange of information, whilst being typified by minimal social distance between them (Brownlie, 2005). The self-help model holds immense potential for late-life education since experts of all kinds retire with the skills and interest to successfully increase both the number and range of resources available. The key objectives stipulated for British U3As, according to one co-founder, included

to educate British society at large in the facts of its present age constitution and of its permanent situation in respect of ageing [...] to create an institution for those purposes where there is no distinction between those who teach and those who learn, where as much as possible of the activity is voluntary, freely offered by members of the University [...] to undertake research on the process of ageing in society, and especially on the position of the elderly in Britain (Laslett, 1989, pp. 177-8).

The hallmarks of British U3As include their sturdy independence and anti-authoritarian stance (Huang, 2006). Aspiring to instigate a democratic movement that enriches the lives of older adults through the development of a range of learning, action, and reflection opportunities, British U3As declined to form part of «the official, state-founded, established structure with its professional teachers and administrators» (*ibid.*, p. 74).

15.4

Contemporary Developments (1991-2017)

The U3A movement has gone a long way since its inception. In 2008, the International Association of Universities of the Third Age (IAUTA) included memberships from U3As situated in 23 different countries, although U3As are present in more than 60 countries (Swindell, 2012). IAUTA organises a biennial international congress and encourages collaborative projects be-

tween U3As situated in different countries. Another productive organisation is WorldU3A. Founded in 1997, it encourages international contacts between U3As through internet activity. One of its invaluable projects consists of the ongoing “technological support” email list moderated by U3A members which provide rapid answers to technology-based problems (*ibid.*).

Although many centres still follow either the French or British traditions, there are at present four other models: the “culturally-hybrid”, “French-speaking North American”, “South American”, and “Chinese” types (Levesque, 2006). Culturally-hybrid U3As include both Francophone and British elements. For instance, U3As in Finland are affiliated with a university programme, use university resources, but then rely heavily on “local learning groups” of older people to define the curricula so that they are characterised by an open-door policy and are essentially co-operative unions (Yenerall, 2003). The U3A in Malta also combines Francophone and Anglophone characteristics by having lectures by university-based professors as well as interest-group sessions under the guidance of members (Formosa, 2012). French-speaking U3As in Canada form part of a traditional university, but then are seriously intent on blurring the distinction between higher education and third-age learning. For instance, the U3A in Montreal established a Bachelor of Arts degree programme to meet the complex needs and interests of the third-age population whereby admission requirements included «appropriate former studies or self-taught knowledge» and «sufficient knowledge of both French and English» (Lemieux, 1995, p. 339). South American U3As are also close to the Francophone model as they are characterised by an institutional link to a host University where the link is regarded as self-evident as much from the University’s point of view as from that of the members. However, South American U3As are also typified by a strong concern for the most deprived and vulnerable sectors of the older population (Levesque, 2006) – which is surely very atypical to the Francophone model whose value orientations tend to be apolitical, and at times, even elitist (Formosa, 2007). Finally, Chinese U3As make use of a number of older revered teachers who are paid a stipend, and older and younger unpaid volunteers, to teach a curriculum which covers compulsory subjects such as health and exercise, as well as various academic and leisure courses ranging from languages to philosophy to traditional crafts (Swindell, 2011). U3As in China adopt a holistic perspective towards learning, and hence, are much concerned with the maintenance and development of citizenship, cultural consolidation, philosophical reflection and bodily harmony.

Contributions of U3As

Various studies applaud U3As for improving the quality of life of members. Admittedly, at present one locates no rigorous research programme investigating the relationship between U3A membership on one hand, and improvement in physical and cognitive well-being on the other. It is surely not the intention here to argue in favour of some strong causational relationship between learning and an improvement in physical/cognitive well-being in later life since, as Withnall (2010) argues, most research in this field has tended to proceed on the basis of a range of clinically unproven assumptions. It remains, however, that there are many valid and reliable studies showing how continued mental stimulation in later life aids learners to, at least, maintain their physical and cognitive health status (Cohen, 2006; National Seniors Australia, 2010). Wrosch and Schulz's (2008) findings that older adults who were proactive and persistent in countering health problems experienced greater physical and mental health benefits augurs well, since most U3As offer various courses on health promotion and illness prevention. In this respect, the fact that Australian elders perceive their U3A membership to have improved their health status is surely encouraging:

If you're active, and you're active in your mind then, yes, it does make a difference to your health [...] but if you were sitting down doing nothing, well your system's not working – the brain's not working. And if the brain starts to get slack or just doing nothing it transmits to the rest of the body and the rest of the body becomes slack (Liverpool U3A member [Australia], cited in Williamson, 1997, p. 180).

Sonata and colleagues' (2011) study in Brazil also underlined the role of U3As in augmenting elders' physical health. The Piracicaba U3A was found to function to preserve members' "fat-free mass" levels by decreasing and improving their levels of inactivity and physical exercise respectively, factors which are crucial to, at least, maintaining, well-being in later life.

U3As also hold a potential to lead learners towards improved levels of psychological capital. Studies have uncovered an association between participation in U3As and improved levels of self-assurance, self-satisfaction, self-esteem and sense of coherence on one hand, and a decline of depressive and anxiety symptoms on the other (Formosa, 2000; Zielińska-Więczkowska *et al.*, 2011, 2012). This implies that engagement at a U3A centre

can have therapeutic functions towards the adjustment of older adults with their ageing and retirement transitions. Indeed, a study on the relationship between psychological well-being (autonomy, personal growth, control, positive relationships with others, purpose, personal acceptance, and generativity) and participation in the São Paulo U3A in Brazil concluded that «the students [sic] who had been longer on the programme run by the institute studied, exhibited higher levels of subjective and psychological well-being [... where the satisfaction and benefits gained [from learning] extend into other areas of life» (Ordonez *et al.*, 2011, p. 224). Turning our attention again to the Irish context, Whitaker's (2002, quoted in Bunyan, Jordan, 2005) research concludes that U3A participation helps to develop confidence as learners realise the value of the knowledge that they share with others. She notes that by participating in U3As members get their life experiences recognised and appreciated, and learn how to get beyond the critical voice that tells us we "aren't good enough" or "that we have nothing to say". Elsewhere, Irish participants also disclosed how U3A helped them to improve their confidence in their abilities in information and communication technology (Bunyan, Jordan, 2005).

It is noteworthy that the majority of U3As only exist because of time-consuming work on behalf of volunteers. In the UK, the balance of volunteers to staff is overwhelming, with over 250,000 members and only 14 staff at the national office, half of them part-time (Cox, 2011). In Italy, 57 per cent of tutors are volunteers (Principi, Lamura, 2009). The economic value of U3As has been efficiently gauged by Swindell who, instead of modestly letting the record of voluntarism speak for itself, actually calculated an actual monetary figure to the work that third-age volunteers donate to many sectors of the Australian and New Zealander U3As. His latest calculations are of \$21 million and \$1.9 million for Australian and New Zealand U3As respectively (Swindell *et al.*, 2010). Whilst 22 per cent of volunteering time was generally spent on administrative issues, the remainder consisted of actual tutoring hours. Swindell's estimates provide proof to the claim that the U3A phenomenon enables the government to spend less on welfare and civic programmes targeting the improvement of the quality of life in later years, as well as challenging the orthodox beliefs of ageing as a period of loss and decline, and that older adults are simply recipients of welfare and consumers of public funds. The U3A phenomenon also problematises Putnam's (2000) argument that civic participation has declined in the latter part of the 20th century, whilst backing Freedman's (1999, p. 19) claim that older adults have become the «new trustees of civ-

ic life». Undoubtedly, U3As are a strong affiliate in the “civic enterprise” movement. Although U3As are not political enterprises, and thus do not promote any kind of political activism, they do encourage older persons to become involved in helping others in the community. U3As enrich societies with opportunities for greater fulfilment and purpose in later years, and therefore, enable older adults to reach improved levels of active, successful and productive ageing. Indeed, the U3A approach provides a sustainable policy model for how future governments might capitalise on the productive resources of the increasing numbers of expert retirees.

15.6

Issues and Predicaments

Despite the aforementioned contributions of U3As to society in general and older persons in particular, what appears to be a forthright exercise in facilitating learning opportunities for older adults is also fraught with widespread misconceptions and biases. In some ways, and especially from a logistical perspective, U3As have become victims of their own success. The triumph of U3As in attracting more learners is giving forth to problems in locating suitable venues large enough to accommodate the membership body, and enough volunteers to administer and run courses of study and interest-groups. This is especially the case for U3As following the self-help model who tend not to possess sufficient funds to employ administrative staff and who are reluctant to implement or increase enrolment fees as this is perceived to undermine the self-help character of the organisation. Indeed, some U3As had no other option than to cap memberships in order to ensure that members could be accommodated in the already over-stretched facilities of centres, as well as operate waiting lists (Picton, Lidgard, 1997). Laslett's (1989, p. 178) objective for U3As to «undertake research on the process of ageing in society» has also emerged as a contentious issue. Laslett thought that U3A members are in an ideal situation to undertake research that would counter not only the predominance of ageist literature on the ageing process but would also function «to assail the dogma of intellectual decline with age» (*ibid.*). Although initially one witnessed some level of participation on behalf of U3As in a number of research projects, it must be admitted that most U3As neither participate in nor produce research. Most U3A managers are occupied with the demands of day-to-day organisation, and research is not amongst the members' high

priorities. As Katz (2009, p. 156) claimed, members «are seeking an education apart from formal accreditation institutions, and Laslett's mandate to create an alternative, Third Age research base [appears] to be daunting».

Although U3As following the Francophone model are more able to access funds, retain nominal enrolment fees (as they make free use of university resources), and implement easily any course that strikes the fancy of members due to the large pool of teaching personnel at the university/college, they are not devoid of limitations. Lectures generally take place on university campuses which tend to be far away from village and city centres, and hence, inaccessible for many older adults (Picton, Lidgard, 1997). They are also characterised by a lack of agency over the ethos and direction of the U3A, as usually the academic body has the last say on every matter and total decision-making power on the most fundamental aspects (Formosa, 2000). For instance, the drive behind the founding of the U3A in Malta arose neither from responses to community needs nor from requests by older persons themselves, but from the aspirations of academics working in the field of ageing (*ibid.*). As a result, it is governed by a "mission statement" that was written and developed exclusively by university academics without any consultation with age-interest groups or older persons.

Irrespective of the type of organisational model being followed, research has found U3As to incorporate a number of crucial biases. A consistent criticism levelled at U3As is that of elitism as there is a compounding class divide affecting chances to seek membership (Radcliffe, 1984; Swindell, 1993; Picton, Lidgard, 1997; Formosa, 2000, 2007; Alfageme, 2007). Although U3As offer no hindrances or obstacles to membership, membership bodies tend to be exceedingly middle-class. Educators have long commented how «threatened... by elitism and pastime activism, U3As might indulge in narcissism and escapism and miss altogether the highest vocation they should respond to» (Philibert, 1984, p. 57), and how U3As «pandered to the cultural pretentious of an aged bourgeoisie who had already learned to play the system» (Morris, 1984, p. 136). This occurs because older adults who have experienced post-secondary education, and have advanced qualifications and skills, are already convinced of the joy of learning so that their motivation to enrol in U3As is very strong. To middle-class elders, joining means going back to an arena in which they feel confident and self-assured of its outcome and development. On the other hand, working-class elders are apprehensive to join an organisation with such a "heavy" class baggage in its title. Moreover, the liberal-arts curriculum promoted by most U3As is perceived as alien by working-class elders,

who tend to experience “at-risk-poverty” lifestyles and are more interested in practical knowledge related to lifelong work practices. Formosa (2000) argues that U3A may actually be 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 friends and other social viewers, membership is employed as a strategy of class “distinction”.

U3As have also been criticised for including gender biases that worked against the interests of both men and women. On one hand, all surveys uncover a positive women-to-men ratio: 3:1 in the UK and Malta (Midwinter, 1996; National Statistics Office, 2009), 4:1 in Australia (Hebestreit, 2008), and 2.5:1 in Spain (Alfageme, 2007), to mention some. It may seem that this gender imbalance is because women hold higher life expectancies and leave employment at an earlier age than men. While such explanations do make sense, they fail to explain why older women choose to enrol in U3As and overlook that married women retirees remain accountable for most domestic responsibilities. At the same time, the high participation rates of women do not necessarily imply that U3As are fulfilling some beneficial roles towards them. The reality, in fact, is otherwise, as studies point out how U3As may serve to anchor female members in gender expectations about women’s traditional roles. For instance, women tend to be less visible in mixed classes at U3As where male learners are more likely to dominate any discussion even when in the minority (Bunyan, Jordan, 2005). Formosa (2005) also noted how the Maltese U3A was characterised by a “masculinist” discourse where women are silenced and made passive through their invisibility, an outnumbering of male over female tutors, and a perception of older learners as a homogeneous population which contributed towards a “male stream” learning environment. However, this is not the same as saying that men enjoy preferential treatments in U3As. The low percentage of men signals strongly that for a number of reasons the organisation is not attractive to them. First, U3As are promoted through avenues – such as during health programmes on the broadcasting media or through leaflets at health centres – where most of the clients are women. Second, U3As are exceedingly “feminised”. Not only is the membership mostly female, but so are management committees (Williamson, 2000). As Scott and Wenger (1995, p. 162) stated, older men tend not to want to become involved with old people’s organisations they perceive to be dominated by women. Third, U3A courses tend to reflect the interests of the female membership. Health promotion courses, despite being open to all, are generally delivered by female tutors with a bias towards women-related health issues

such as weight-loss and osteoporosis (Formosa, 2005). U3As, hence, continue to enforce men to relate to a culture that encourages them to cling to traditional roles and patterns of behaviour where it is believed that that engaging in learning is for women rather than for men.

Other predicaments concerning the U3A include the movement's tendency to lack ethnic minorities and fourth agers in its membership body. For instance, both Swindell (1999) and Findsen (2005) point out that given the multi-cultural environment of Australia and New Zealand, one would reasonably expect to see at least some Asian faces plus those of Maori and Pasifika people. This is, however, not the case and memberships of Australasian U3As are heavily represented by members from the Anglo-Saxon community. Findsen concludes that the exclusion of minority groups may not be deliberate, but as the projected ethos of U3As mirrors the values of the dominant groups in society, ethnic minorities feel that they do not have the necessary "cultural capital" to participate in such learning ventures. At the same time, U3A membership bodies generally do not include older persons experiencing physical and cognitive difficulties. This is surprising considering that there are many old-old persons (aged *circa* 75 plus) facing mobility and mental challenges. Moreover, even at a relatively young age, many a times prior to statutory retirement, various older adults experience complications from strokes, diabetes, and neurological diseases so that their functional mobility and intellectual resources become seriously limited. Indeed, a significant percentage of older adults experience significant mobility and mental problems to the extent of becoming housebound or having to enter residential and nursing care homes. Unfortunately, to-date one locates no distinct efforts by the U3A movement to encompass the learning needs and interests of frail older adults in its aims and objectives.

15.7

Renewing U3As: Future Roles, Opportunities and Directions

As the U3A movement embarks on its fifth decade, it would be a mistake for programme managers to rest on its laurels, as doing so the movement would risk meeting the same fate as the sewing circles of our grandparents' time. The key challenge faced by U3As is to remain in tune and relevant to the life-world of present and incoming older cohorts. The U3A concept emerged in the early 1970s when the life course was divided in three clear and distinct stages: childhood as a time for education, adulthood as a time

to raise a family and work, and old age as a brief period characterised by withdrawal from work until frail health and eventually death. During this period the identity of older people existed within the context of the welfare state that embedded them in a culture of dependence through a compulsory pensioner status and near-compulsory entry to residential/nursing care (Townsend, 2007). With the coming of late modernity, the social fabric became more fluid in character, so that later life disengaged itself from traditional concepts of retirement to become increasingly complex, differentiated and experienced in a myriad of ways (Blaikie, 1999). Nowadays, identities in later life take on a “reflexive organised endeavour”, operating on the basis of choice and flexibility, and finding their full expression in material consumption (Gilleard, Higgs, 2000). However, it seems that U3As remain locked in more traditional perceptions of late adulthood and somewhat oblivious to such transformations. James (2008) argues that centres have generally failed to keep pace with what older adults actually do in their lives, what tickles their fancy, and what motivates them to age actively, successfully and productively. She highlights how the U3A movement tends to be characterised by what Riley and Riley (1994) term as “structural lag” – namely, a failing on behalf of structural arrangements to meet or be relevant to the needs of a large proportion of its clientele. In Riley and Riley’s words, “structural lag” refers to

the imbalance – or the mismatch – between the strengths and capacities of the mounting numbers of long-lived people and the lack of role opportunities in society to utilise and reward these strengths. This is the problem we call structural lag, because the age structure of social role opportunities has not kept pace with rapid changes in the ways people grow old (*ibid.*, p. 15).

Similarly, Formosa (2012) points out that U3As generally overlook how incoming older cohorts are characterised by diverse generational dispositions when compared to those older adults that Vellas and Laslett had in mind when drafting the movement’s principles and objectives. Undoubtedly, the past two decades have brought cultural changes that have altered the norms and values of contemporary older cohorts. Most salient among these changes include an improvement in their wealth, health, and educational status, smaller family circles due to more older women having participated in labour markets, and an increasing readiness to combine part-time employment with leisure pursuits in retirement. The coupling of such transformations to other processes, most notably secularisation and individualisation, has been instru-

mental in urging third agers to create their own life biographies rather than remain shackled to traditional expectations towards daily living in “old age”. In such circumstances, it is surely time for U3As to re-appraise their functions and purposes and demonstrate that the movement remains a forward-thinking group which welcomes new ideas and new ways of practice. It would be extremely unfortunate if upcoming and present third agers feel the need to start new organisations simply because of their perception that U3As are no longer relevant to their lives. This section forwards three recommendations for the U3A movement to remain more in tune with the needs and interests of contemporary older adults.

Overcoming French-British polarities Contrary to what is generally assumed, studying for pleasure and towards a qualification are not necessarily incompatible, but may even be complimentary. After all, one frequently hears of third agers being emboldened by their U3A experience as to start a university course, and on the other hand, of older undergraduates taking a keen interest or even becoming members in their local U3A. Rather than entrenching the U3A experience in an absolutist vision – advocating either strict autonomy or complete integration with traditional universities – U3As have much to gain from seeking partnerships with tertiary educational sectors working on similar ethos. Whilst partnerships in older adult learning do not have to be formally constituted and grand affairs, the benefits of collaborative approaches include «better information is available to help plan for learning, to deliver it in the best way, to promote engagement with it and to provide progression routes from it» (Gladdish, 2010, p. 26). One successful partnership between a traditional university and a U3A is found between the University of South Australia and the Whyalla U3A (Ellis, 2009; Ellis, Leahy, 2009). The central location and resources of the university provided rent-free premises which allowed their fees to be kept much lower than in other Australian U3As, and easy access for invited speakers and members. U3A members also enjoyed interacting with younger students and the help and encouragement that university staff extended to them. On the other hand, the benefits that the campus received from the U3A included the location of a pool of “clients” for nursing and social work students, volunteer and administrative help on open days, whilst adding to the cultural and generational diversity present on campus. Another promising partnership constitutes the memorandum of understanding between Third Age Trust and The Open University in Britain which recognises the complementary missions of both organisations, and which may lead to better opportunities for older learners to improved access of library

and online facilities, participation in university courses and modules, and registering as students with reduced fees and different entrance qualifications.

Quality of learning Research studies and rationales focusing on the U3A movement affirm in an equivocal manner that learning holds positive benefits for its members. However, the precise contribution of learning in U3As to an empowerment agenda remains ambiguous. One must ask whether learners at U3A centres are too docile, too passive, as though listening alone were enough. This is certainly the case for U3As following the French model whose members are lectured by professors employed by the traditional university which the centres belong to. In its quest to improve the quality of life of the member body, the U3A movement is to seek a learning environment that is more dynamic in nature, one which facilitates

learners who are able to take control and direct learning; learners who are enabled to continue learning after a course has finished; learners who, in their daily lives, know how to put into practice learning they have undertaken; [...] and learners who develop strategies that enable them to know how to go about the business of learning (Gladdish, 2010, p. 15).

This is possible if learning environments at U3As drop traditional “top-bottom” approaches in favour of a situation that places the teacher and learner in a dynamic relationship. Although teachers will always keep hold some level of authority on the learning session since it is their responsibility to create and sustain the right environment for learning to occur, older learners should have an opportunity to have a say in directing both the nature and content of the learning that takes place. Following Gladdish (2010), successful learning in later life relies on consideration and consensus to drive activity, one which involves negotiation, advocacy, intervention, promotion, and sometimes compromise. In short, «it is about creating something new with, as well as behalf of other» (*ibid.*, p. 10).

Quality of instruction The quality of instruction is also to be put under scrutiny as it is important that older learners do not fall back on the educational experience of their youth. Top-bottom approaches to educational instruction are to be avoided. Instead, course tutors should enable older adults to foster the control that they may be consciously or unconsciously lacking through encouragement to take responsibility for their learning by choosing those methods and resources by which they want to learn. A

useful strategy here is to emphasise the importance of personal goal setting at the beginning of the course schedule and encourage it through activities such as making a personal statement of what the learners want to achieve. Facilitating learning in later life thrives on collaborative and partnership, and is characterised by “co-operative work” between tutors and learners (Gladdish, 2010). Tutors are also encouraged to draw on the life experiences of learners by allowing them to share examples of their experiences with the class and encouraging them to think about how those examples relate to class information. Course material that is presented in a way that reflects the “real world”, rather than some abstract component, is very popular with older learners. It is important for facilitators to synchronise themselves with the life course experience of learners, born around World War II, and who lived their teenage and early adult years in the fifties and sixties. Nevertheless, U3As must not assume that older learners continue living in some by-gone world. Rather, e-learning has become increasingly popular in later life as it offers the opportunity for older learners to access information and communicate with others when and if they want to. For U3As to continue being relevant to contemporary elders, centres must make more effort to embed their learning strategies in the web 2.0 revolution that now provides extremely user-friendly applications. Contrary to its predecessor, web 2.0 uses interactive tools – ranging from Blogs, Wikis, Podcasts, online journals, to virtual picture databases – to offer limitless possibilities for an interactive, empowering, and participatory form of older adult learning.

Quality of curricula The relevance of taught content warrants careful attention since it tends to influence the extent that older persons are attracted to and benefit from the learning experience. The curriculum at U3As should be as bold and original as possible, negotiated with, and even determined by, the most vital interests of learners. However, this does not mean that U3A centres do not have any part to play in the choice of subjects. As Gladdish (2010, p. 36) affirms, «learning providers must be part of the debate that identifies appropriate curricula for older people, and they need to exercise professional judgement and integrity about their ability or otherwise to contribute to development and delivery». More specifically, there is a real urgency for U3As to include non-liberal and health related areas of learning such as financial literacy and caregiving, but especially, scientific courses that introduce learners to environmental, botanical and zoological studies. Since the correlation between later life and illiteracy is well-known, U3As would do well to set up literacy courses for older persons, a move that would help in mitigating the

oft mentioned charge of elitism. Moreover, the introduction of new areas of study may function for U3As to become successful in attracting non-typical learners such as older men (e.g. gardening, toy modelling, astronomy) and ethnic minorities (e.g. martial arts, origami, tai-chi). U3As must also co-ordinate intergenerational learning sessions that include curricula catering for learners from the whole of the life course, and hence, linking third agers with children, teenagers, adults and even older peers. Specific activities may include book clubs, community work and film screenings, drama, as well as adoptive grandparent-grandchild relations. U3As would also do well to adopt curricula that operate on the principles of situated learning. A promising avenue in this respect is environmental volunteering where U3A can link up with eco-friendly organisations that provide both learning opportunities as well as possibilities for green volunteering. Older persons possess a maturity of judgement, and therefore, are highly apt to highlight the imperative need to create a sustainable society and conserve our natural resources.

15.8 Conclusion

This paper began by tracing the origins and modern developments of the U3A movement. U3As vary in size and resources, and their development is inevitably uneven. However, all are united in their efforts to provide learning opportunities for older adults, as well as increasing the visibility of older generations whose presence and worth is easily undervalued and overlooked. U3As also remind governments and educational bodies of the actual meaning of the words “lifelong learning”, providing a niche for a category of citizens who are left out in the cold as far as learning opportunities are concerned, as governments continue to cling on to traditional models of education geared towards production, profitability and employability. However, this paper also brought forward the difficulties that the U3A movement is currently experiencing, and the possible and actual biases that centres may experience. One cannot let the successes of the U3A movement overshadow the fact that the movement caters little for older men, elders from ethnic minorities, and others experiencing physical and cognitive difficulties. To help overcome such lacunae, this paper also provided a number of suggestions for the future role for U3As, ranging from embracing a broader vision of learning, improving the quality of learning, instruction and curricula, as well as a wider participation agenda that attracts elders experiencing physical and cognitive challenges.

Section III

Third Age and Activity: Hypothesis and Experiences

University of the Third Age, Italian Framework

Chiara Moscatelli

16.1

Universities of the Third Age in Italy

Most of Italian society is composed of elderly people: indeed, according to the Istituto nazionale di statistica (ISTAT), 22% of the population is more than 65 years old. The Italian ageing process, like developed countries in general, is an established condition and is growing year by year. The oldest Italian region is Liguria: here the average age is 48.5, also having the highest incidence of people aged over 65 (28.2%). It is followed by Friuli-Venezia Giulia¹ and Toscana². As ISTAT shows, the absolute values of older people have grown in the last 50 years (ISTAT, 2016).

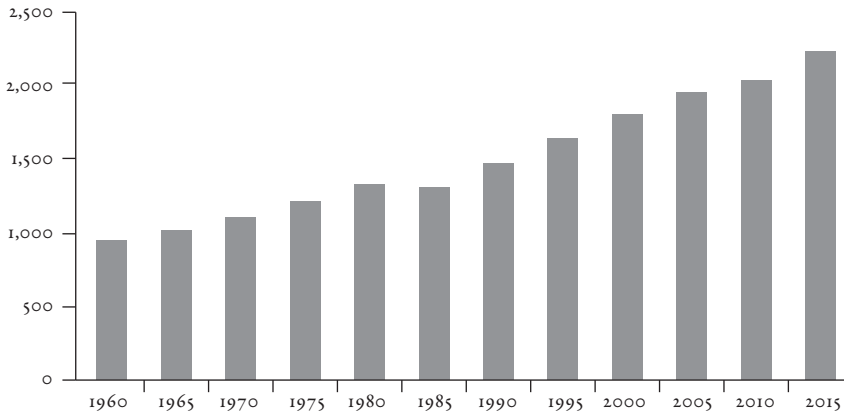
Getting old in the past was considered a problem and the elderly a weight. In the course of time, also in light of rising life expectancy and of society's ageing, however, the need has emerged to reconceptualise this period of life, emerging both at institutional level and from a social and scientific point of view. Therefore, the purpose was delineated to pay more attention to the special needs of older people and to enhance those who, despite their age, are still independent and able to live an active life after retirement. However, despite the potential possibilities of older age, this period of life is still delicate and at risk of social exclusion. In view of this, institutions have a duty to develop and promote so-called "active ageing", understood by the World Health Organisation (WHO) as «the process of optimising opportunities for health, participation and security in order to enhance quality of life as people age. It applies to both individuals and population groups» (WHO, 2002). As such, Italian institutions, state and regions have started to legislate in order to eliminate the social exclusion

1. The average age is 46.9 and 25.4% of its population is more than 65 years old.

2. The average age is 46.5 and 24.9% of its population is more than 65 years old.

FIGURE 16.1

Italian over-65s from 1960 to 2015 in percentage (million)



Source: ISTAT, created by author.

of this age group and have also started to cooperate with other private subjects creating projects for older people. For example, the Italian law proposal no. 3538, “Measures to promote active ageing of population through the employment of older people in activities of social utility and their involvement in lifelong learning activities”, incentivises:

- Older population to be employed in useful social activities.
- Districts in partnership with private subjects to create projects for the elderly.

The law proposal also highlights the importance of lifelong learning, with the intent of endorsing Universities of the Third Age, enhancing knowledge and competences of the elderly. This law, lastly, intends to promote action to tackle the marginalisation of older people, trying to prevent their hospitalisation or their retiring to residential homes for the elderly³.

All things considered, lifelong learning has become important as a useful instrument to improve the participation of the elderly in social life: seminars, classes and laboratories are the possibilities for elderly to study different sub-

3. Here the full text of the law proposal, <http://www.camera.it//leg17/126?idDocumento=3538>, 18th January 2016.

jects, learning new competences and are also places where older people can make new friendships and reinvent themselves, preventing social exclusion.

The activities above are often organised by cultural associations which take the name of Universities of the Third Age, in Italy created in the early 1980s for people over the age of 60, becoming an important reality in Italy, mainly created by private subjects.

In the 70s and 80s, indeed, labour unions attracted the interest of public institutions to the literacy rate, highlighting the necessity to reach the middle-school certificate for almost all the population. A period of planning and experimentation started that led also to recognising the importance of Third Age Education, so that in the 80s the first Universities of the Third Age were founded, even though, in those years, they were aimed at educating people who were already cultured. These new educational offers for the elderly were able to satisfy the requirements of most people who did not appreciate Social Centres, proposing simply recreational activities.

Since their foundation, Universities of the Third Age have been aimed at a major integration of elderly people in cultural and social life: among their purposes there is tackling social exclusion, a high risk in old age, also promoting active citizenship. In the 1980s, therefore, cultural centres and associations increased quickly, also thanks to trade unions.

Universities of the Third Age, indeed, are mostly managed by private associations, even if they are subjects acknowledged by Italian regions as associations specialised in elderly, with the aim of integrating them in social life for active ageing (<http://www.i-stella.com/blog/index.php/2016/04/05/unitre-universita-della-terza-eta/>).

Universities of the Third Age offer courses, organise cultural events and guided tours of monuments and museums, having different types of offer, that go from a real institute with academic calendars to a set of free conferences: there are typical university subjects such as literature, psychology, English or maths but also unusual subjects and activities, such as yoga or singing classes (Altraetà, 2015).

Every university is autonomous but, to be recognised as such by Italian laws, it has to fulfil some minimum requirements, such as the activation of at least a hundred classes for an entire academic year and teachers have to be two-thirds graduate (usually most of them are of university professors, or high-school and middle-school teachers)⁴.

4. Today, as in the past, these Universities are based on voluntary work which give a sense of precariousness, despite being commendable. On the contrary in France, like many

These receive state resources, finalised to improve social integration and active ageing among the elderly. Thanks to public funding Universities of the Third Age require an annual tuition fee that is quite low, about 50 euros. Furthermore, some associations offer a reduction for relatives of people that are already enrolled. In addition to this, older students have to pay a fee for every single course they decide to do, where the amount is generally established by the personal income.

There are no minimum requirements for enrolment in Universities of the Third Age, while age and studies do not affect the possibility for enrolment: many old students have, indeed, only an elementary or middle-school certificate.

Also, at the end of every class taken a certificate of participation is provided which has no legal value, being purely symbolic.

So, to improve lifelong learning, some Italian regions have promulgated regional laws about Universities of the Third Age, protecting them from the legislative point of view. Up to now there are 14 regions that have these regional laws⁵.

Italian Universities of the Third Age are also associated with national organisations, such as the Italian Federation of Universities of the Third Age (FEDERUNI), the University of Age Three (UNITRE), Association for active ageing (AUSER) and the Italian Union of Adult Education (UNIEDA), arisen with the intent of offering students professional and cultural proposals.

FEDERUNI was founded in May 1982 in Turin in order to develop common training models among Universities of the Third Age, supporting those associated⁶. It is a national organisation established by different agencies and represented by local offices⁷.

Before its foundation there were only some volunteer associations which activated adult courses, but they were not uniform and had no common training modes, so this organisation was created in order to be a guide for Universities of the Third Age. Every year FEDERUNI organises inter-re-

other European countries, Universities of the Third Age were created directly by universities themselves, giving them an institutional feature from their foundation.

5. Piedmont, Friuli, Veneto, Trentino-Alto Adige, Emilia Romagna, Marches, Latium, Abruzzo, Sardinia, Campania, Basilicata, Apulia, Calabria and Sicily. In Tuscany there is also a decree-law on adult education and University of the Third Age.

6. Now its main office is in Vicenza.

7. FEDERUNI is composed of an Assembly, a Board of Directors, a President and a President's Office and a Board of Auditors (<http://www.federuni.org/sito/la-federazione/lo-statuto/>; accessed November 7, 2016).

FIGURE 16.2

Italian Regions that have regional laws on Universities of the Third Age



gional seminars with its associated universities in order to improve lifelong learning and exchange of good practices, creating important partnerships that lead to founding new decentralised offices. These seminars are especially meant to:

- Promote research activities on common training models for the elderly.
- Valorise elderly age, as older people are not useless, but able to provide society with their stories and knowledge.
- Incentivise research on elderly.
- Attract interest of society to the elderly condition, so as to promote social inclusion of older people and intergenerational dialogue⁸.

It also endeavours to highlight the importance of national and regional laws in order to promote active ageing, lifelong learning and Universities of the Third Age, up to the present day implemented only in 14 Italian regions, as seen above (<http://www.federuni.org/sito/>).

For several years, FEDERUNI has also been raising Italian State awareness of the elderly, in order to promote the field of lifelong learning and third age education.

8. *Ibid.* accessed 7th November 2016.

As FEDERUNI refers, until the academic year 2014/2015, it had 198 offices around Italy: 89 were main offices and 109 branch, with a total of 44,851 students, 4,463 courses and 4,711 teachers (*ibid.*).

Another important organisation is the National Organisation of Universities of Age Three (UNITRE), founded in Turin in 1972. Like the previous organisation, it is a national association and is divided into different agencies and is represented by local offices (*ibid.*). It aims to train, educate, inform and prevent in order to incentivise lifelong learning and active ageing.

Its activities are:

- Vocational training for associated universities.
- Promotion of volunteering activities.
- Research on cultural initiatives, promoting lifelong learning.
- Activation of new courses for the elderly.
- Promotion of social activities and seminars for members of the organisation and for people interested at lifelong learning.
- Promotion of integrational dialogue (*ibid.*).

As a national organisation, it also represents its associated members at national and international level, organises seminars and exchange of good practices among members. UNITRE collaborates with other Italian and international associations, public and private institutions that have the same purposes (UNITRE, 2015).

People who share the same purpose as the organisation can enrol in UNITRE through one of the local offices. Furthermore, the associates of a district can create a local office themselves, but they have to observe the conditions as follows:

1. Share unitre's purposes.
2. Be a non-profit organisation, and the services of the associates and other people have to be voluntary and the offices of the organisation have to be free.
3. Freedom of association for everyone who wants to become a member of unitre.
4. Periodic publication of an annual report, where the remaining organisation budget cannot be distributed to the stakeholders (*ibid.*).

UNITRE, lastly, has local offices and affiliate associations in almost every part of Italy, counting 300 local offices and Piemonte is the region with the highest number of these, having more than 80 of them⁹.

9. As UNITRE refers on its website, local offices are distributed as follows: 1 in Abruzzo, 20 in Basilicata, 3 in Calabria, 13 in Campania, 2 in Emilia Romagna, 1 in Friuli Venezia

Another important organisation regarding Universities of the Third Age is the Organisation for active ageing (AUSER) which, as its name suggests, is finalised to promoting active ageing and creating a new and important role in society for the elderly, promoting different activities:

1. Personal care, social tourism and spare-time activities.
2. Domestic care for elderly.
3. Lifelong learning, through Universities of the Third Age and cultural clubs.

AUSER, in contrast with the previous national organisations, offers a quality certification of its Popular Universities and of its cultural clubs through two stickers, one blue and the other green. To obtain the certification, it is necessary to satisfy some requirements, and submit an application that will be judged by a committee of specialists (<http://www1.auser.it/cosa-facciamo/apprendimento-permanente/certificazione-di-qualita/>; accessed November 1, 2016).

Instead, the Italian Union of Adult Education (UNIEDA) is a non-profit organisation, with social, cultural and educative purposes and was created from a previous organisation in 2006¹⁰.

The previous organisation before UNIEDA was created in the 1990s and intended to go beyond the acritical learning that characterised the Italian education and created a new learning method, based on creativity. Its project was designed to create a constant connection with the labour market, society, cultural operators and public and private institutions.

UNIEDA promotes individual growth and civil development of people, valorising research on professional, civil, psychological and social skills and developing decision-making autonomy, raising awareness about the importance of solidarity and about one's own rights and responsibilities.

Its proposal falls within the framework of the national education system of lifelong learning, collaborating with cultural associations, extracurricular associations, Popular Universities, Universities of the Third Age and realising proposals intended to encourage laws that defend the right to education and a quality education for workers, younger people, women, retirees and the elderly.

Giulia, 22 in Lazio, 15 in Liguria, 22 in Lombardia, 12 in Marche, 1 in Molise, 86 in Piemonte, 26 in Puglia, 9 in Sardegna, 34 in Sicilia, 22 in Toscana, 19 in Umbria, 1 in Valle d'Aosta, 3 in Veneto (http://www.unitre.net/unitre/Le_Sedi.html; accessed 5th November 2016).

10. Like AUSER, its interests include the elderly but they are not the primary concern of the organisation.

UNIEDA also cooperates with departments of social science and with lifelong-learning researchers, as all disciplines that study active ageing, so as to create a combined proposal (<http://www.unieda.it/chi-siamo>; accessed 7th November 2016).

16.2

Piemonte Region: Case Study

In Italy research and attention to the elderly is growing year by year, but much has to be done: despite the presence of numerous Universities of the Third Age, indeed, there are no reports on these themes, either by regions, or by any municipality such as by associations and public or private institutions. In this framework of absence of reports and research, Piemonte is instead notable; it periodically publishes a report on a survey of Universities of the Third Age and activities for adults in its territory. Piemonte also is the Italian region with most universities for the elderly: as regards the academic year 2014/2015, indeed, 42,836 attended adult education classes and there were 169 courses organised both by municipalities and by private associations¹¹.

Courses were held by 5,282 teachers, relators and lab professors. 80% of them were volunteers, teaching for free¹²: courses organised by private associations had most volunteer teachers, because of the presence of statutes in the organisations for volunteering and making freely available teachers' competences and knowledge. Piemonte, however, highlights an exception to the rule for certain subjects, such as computer science or foreign languages with mother-tongue teachers: in such cases it is difficult to find qualified teachers who are willing to teach for free.

Courses are also partly financed by tuition fees of participants: associations require membership fees and sometimes other enrolment fees, while districts require only an application fee. Sometimes, however, organisations and municipalities require a further fee for single courses: this happens when they need particular spaces, teachers who have to be paid

11. 151 of them were organised by 99 different organisations and remaining by districts (Regione Piemonte, 2016, p. 3).

12. 408 teachers, volunteers or paid, taught courses organised by districts, while the other teachers taught courses organised by private institutions (*ibid.*, p. 4).

FIGURE 16.3
Piemonte Region



or particular instruments, such as cookery classes or computer classes. The enrolment fee, in general, is around 33.85 euros per student¹³.

Piemonte region and banking foundations partly finance courses of municipalities and private institutions¹⁴. Municipalities themselves are co-financiers of courses: in the academic year 2014/2015, 50 courses were financed by districts or banks and the former gave the largest monetary contribution, which made available spaces used by private associations for free or at a lower cost.

16.3 Conclusion

Retirement and being elderly are critical periods of life, when people have to invent themselves again, and change their habits. Older age, on the

13. Piemonte Region underlines that the 18 courses organised by districts required lower enrolment fees than private institutions: 27.50 euros compared to 34.60 euros (*ibid.*, p. 7).

14. In 2014 and in 2015 Piemonte Region co-financed municipalities and private institutions with a budget of 50,000 euros, co-financing 13 courses in 2014 and 8 courses in 2015 (*ibid.*, p. 9).

contrary of the common point of view, can be an active period of life, full of activities and new competences. Lifelong learning is an important instrument for active ageing, where the elderly can acquire new knowledge, know-how and competences, bringing them happiness and allowing them to make new friendships, combatting then the typical social exclusion that characterises old age.

In Italy, as seen above, there are many private institutions that promote lifelong learning and try to develop it further through conferences and meetings with public institutions, such as municipalities and state spokespersons. But the Italian framework on Universities of the Third Age and lifelong learning in general is complex and there is not much research on this theme in Italy, showing that the third age is a secondary research branch: there is, indeed, only the Piemonte research on lifelong learning. It seems that public institutions tend to underestimate this period of life and lifelong learning, while private institutions give it more value, in particular organisations that intend to valorise the elderly. Nevertheless, both need to develop the themes “elderly, active ageing, education and lifelong learning” better: only 6.6% of the Italian population participate in lifelong learning, while the European Union has the goal of 15% by 2020 (<http://www1.auser.it/cosa-facciamo/apprendimento-permanente/>; accessed 7th November 2016), which is quite far for Italy now.

To achieve this goal, it is necessary to have more care for the elderly, creating a legislative framework that incentivises active ageing through different instruments, such as lifelong learning.

University of the Third Age Genoa Experience

Francesco Surdich, Monica Sbrana

17.1

Introduction

The University of Genoa founded the University of the Third Age in 1983. From its foundation, Genoa UTA has continually grown until nowadays, with two main goals: offering education, culture and socialisation to retired members of the local community; disseminating and sharing university knowledge, in all fields of our research interests. Students can be introduced both to basics and to the latest academic research findings by university teachers who organise cultural lectures for them, without formal qualifications but with an academic and high-quality approach. The University of Genoa is indeed the only Italian university academy offering a UTA. This is probably due to the particular composition of local Ligurian society, the eldest in Europe with an average age of 50 years, with 30% of people over 64, but also due to the University of Genoa's social engagement policy, very responsive to social and cultural needs of the local community.

FIGURE 17.1
Logo of the University of the Third Age – Genoa



Source: University of Genoa Website.

FIGURE 17.2
Age of Students

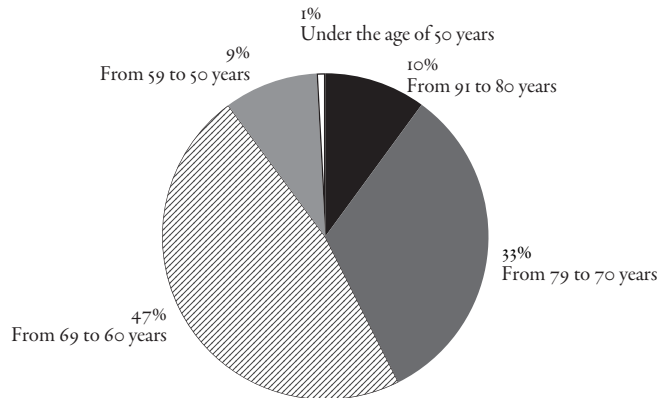
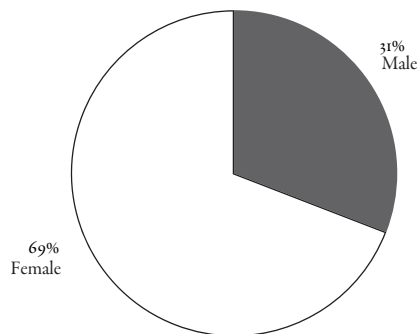


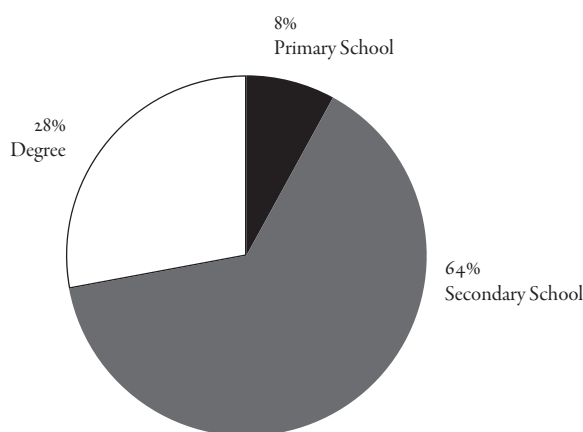
FIGURE 17.3
Gender of students



17.2 Teaching Supply and Students

Genoa UTA offers 7 subject courses (100 hours each) in Humanities; Economics, legal and political subjects; Medical and pharmaceutical; Natural Science; Engineering; Architecture, Foreign Literature and Culture and 9 other supplementary courses (40 hours each): 4 foreign languages; Musical culture; Art history; Latin language; Techniques of drawing and painting; Computer science. Among the courses, the oldest and most popular is by far

FIGURE 17.4
Students' level of education



the humanistic one, while among supplementary courses, the most popular are those of Art history and Foreign Languages. On the whole, Genoa UTA offers 1,500 hours of lectures and other cultural activities each year. UTA students are also involved in academic life: they receive daily information about and are involved in every significant university and local cultural event.

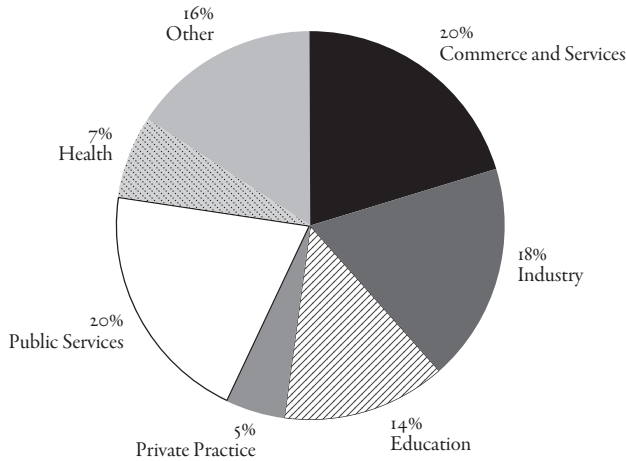
Paying a token price of 50 euros each year, students can enrol on one course, one supplementary course and choose one foreign language among English, French, Spanish and German. Lessons start in November and continue until June, 8 hours a week. There is no homework and no exams but after three years of attendance, students can prepare and discuss in front of an academic committee a sort of thesis, without formal value, but usually developed very seriously, with the scientific support of an academic teacher.

In 2016, there were 1,200 students in Genoa UTA. It is interesting to observe their composition that reflects the local social and demographic structure of the population.

The average age of students is 60 years, continually decreasing in recent years. 70% of them are women (FIG. 17.2).

Average age is an important datum to consider to understand students' needs and to plan the cultural and learning offer. First, third age is not a single age: from their 60s onwards, people live at least three kinds

FIGURE 17.5
Students' kinds of work



of transition (from active professional life to retirement; from cohabiting children to couples; from couples to a single family); most of our *younger* students have to look after their grandchildren; they have very busy agendas and very clear ideas on what they want and appreciate. However, they pay special attention every year to complete the customer satisfaction survey, suggesting improvements in subjects and organisation.

Most of them are high-school and university graduates, though the only requirement to enrol is to be 45 years old, leaving aside educational levels. 80% enrol every year, some of them change area each year. Most of them enrol on courses far from their professional experiences, but near to their interests or passions that they can finally follow during their retirement.

40% of students worked in the public sector, such as health, education or institutional authorities (FIG. 17.5).

These students' data reflect, as mentioned above, the demographic structure of Ligurian inhabitants: healthy people, with good early pensions (especially previous public employees) but with a high percentage of aged single families, who are not simply looking for something to spend free time on, but for something to get involved in and to keep their brains in training.

Management of Learning Activities

The University of Genoa UTA is directed by a Scientific Committee, responsible for all learning activities, which is made up of a President and 13 other university professors, one for each subject area of our cultural and learning offer. They periodically meet to plan learning activities and social events, choose teachers, evaluate quality surveys and plan any UTA development programme. Over 350 teachers are involved in courses (most of them university professors, with the collaboration of many influential members of our community), over 50 teachers are involved in supplementary courses. All teachers work for free. Due to the University of Genoa's social engagement policy, UTA learning and cultural activities are organised in partnership with the most representative local associations and institutions, like museums, theatres, the Opera House, cinemas, cultural trusts, the music conservatory which offers services at special price and reserved events in close connection with topics learned in courses. The University of Genoa's lifelong learning office supports UTA for all organisational aspects (training materials, training units, tutorship, insurance, classrooms, devices, administrative procedures, etc.) with 2 employees and one coordinator. UTA students are involved in organisation too, since two students per course cooperate with the organisation, especially to facilitate the circulation of information and management of unexpected events.

The Scientific Committee starts planning activities in January for the next academic year; each area coordinator plans topics to deliver and looks for teachers among his/her colleagues. In July all information about the next academic year is available on the website as well as any news and learning materials. Students enrol on line from September to November. After more than 30 years of experience, Genoa UTA is now ready to improve, especially enhancing solidarity and support between generations: UTA will involve young secondary and university students to teach old people foreign languages, social media and ICT technologies in general, and the elderly offer them their professional experience and time for example for school and work guidance, support to study, lectures at University, etc.). The first tests on this kind of mutual learning in previous academic years had encouraging results.

Specifics of Senior Education in Slovakia

Drahomíra Gracová, Erik Selecký

18.1

Introduction

Ageing population is an important demographic trend all over the world. Demographic forecasts speak about the increasing number of older people. Gradually, older people's lives, meeting their needs and vitality are better nowadays. An older person has great potential and many experiences that can be used effectively. Ageing is associated with maturity, responsibility, wisdom and respect. However, it also brings some negative points like weakening physical health, poverty, social isolation and social dependence. Therefore, society should offer older people programmes for active ageing and healthy ageing programmes. Our challenge is to expand an active lifestyle for older people. This lifestyle should put emphasis on physical, psychological and social health.

18.2

Education of Seniors

Ageing is a natural process, it is not a problem. It comes with biological, economic, social and health changes. An older person has the same desires in different periods of his life. He is anxious about safety, love and convenience. According to the WHO healthy ageing is a «process of taking the possibility and opportunity for physical, social and well-being to prolong life expectancy in good health». In terms of physiology, it is a gradual reduction of various organ functions, which reduces adaptability. These changes are seen inter-individually. It is important to say that if a person moves in a suitable environment without changing the external and internal environment, even reduced physiological functions can provide valuable and quality life at this age.

Ageing is a lifelong process. The main goal is to minimise individual risks, negative influences and prepare a man for active old age in good health and a comfortable environment. It is important to respect their human dignity, needs and values of autonomy and spiritual beliefs (Gracová, 2014).

A positive family environment can ensure quality and satisfied ageing in good health in a well-functioning health and welfare system. It is therefore necessary to actively help to maintain their physical and mental health by appropriate educational activities. Education is provided by several institutions. The well-known are the Universities of the Third Age (UTA). Educational activities bring a lot of new knowledge, social contacts and contribute to improving the quality of life. Education can be a hobby or interest in getting new information and experience. Education of seniors is often preventative, an elimination of and compensation for deficits.

Education of seniors differs from schools in that it is primarily based on voluntary work. The educational process means a lot for seniors, not only in the acquisition of new knowledge. In the implementation of the educational process, a senior's characteristics should be considered and respected. Biological changes of ageing, health and mental changes can also adversely affect the course of education (Beneš, 2003, p. 141).

An educational plan includes (Bašková, 2009, p. 142): goals of educational process, topics and sub-topics of education (according to degrees of prevention), organisational form (individual form, group form, and community form), types of learning, environment, timetable of education and specifics of educational strategies. In addition to these classical methods, we can use educational methods of motivation, activation, alternative methods like brainstorming, heuristic methods, role playing etc. In education we use many different material and non-material equipment and technical teaching tools. In a training needs analysis, the formulation of programmes, training and educational offers other characteristics are also to be understood.

Educating people of older age is one of the means to delay ageing. Education relates to relaying information. This is an important help (Prusáková, 1994, p. 106) to search for new horizons of life to overcome problems. It is important not to forget the fact that elderly people need more time to learn and therefore it is necessary to respect the standards and the pace of education. Education and training fulfils the essential function as well as the secondary one called *second chance*. It is important to develop a concept of education so that we take into account the availability, quality, adaptability and feasibility (Prusáková, 1996, p. 108). It is necessary in this regard to encourage people, provide them with support and develop

andragogic theory. It is necessary to provide sufficient space for seniors and create conditions to participate actively in social and political life in our country. Seniors must themselves try to use all the opportunities offered to them (Prusáková *et al.*, 2001, p. 169).

18.3

System of Education of Seniors in Slovak Republic

Active ageing currently seen as a long-term process based primarily on changing people's minds. To change ageing to active ageing is not possible without the willingness of people to accept such a lifestyle that is a natural part of purposeful preparation for life in the senior age. Global ageing induces structural changes in various areas. It is necessary to create conditions for active ageing (Rychtaříková, 2011).

The main pillars of active ageing are education, health and social protection (Podmanická, 2012, p. 86).

Current society ask questions about the quality of life. In literature the concept of quality of life is interpreted in different ways. D. Popovič (2011, p. 32) says: «Quality of life reflects how people perceive their place in life, in the context of culture and value systems in which they live and in relation to their goals, expectations, standards and concerns». Efforts to improve the quality and application of the elderly in society should not remain only a topic of much debate but has to systematically result in concrete action. In this regard, it is appropriate to develop activities in various ways – to develop knowledge and skills, not to hesitate to acquire new knowledge in institutions that offer these opportunities.

As stated by Krystoň (2013, p. 21) «the area of education of seniors has come in the Slovak Republic in the past two decades in the spectrum of interest of the two government departments. It is in the competence of the Ministry of Education and the Ministry of Social affairs. In both these sectors, it is the issue of education of people in the post-productive age anchored in the documents, in which the intentions of the state education policy are expressed. The basic legislative norm about education of seniors is the Law on lifelong learning number 568/2009». In the documents “Lifelong Learning Strategy 2011 and the Action plan for lifelong learning strategy 2011”, the issue of education of seniors touches only certain parts. In connection with the Ministry of Social Affairs, it established the Committee for the elderly in 2011, which is a permanent professional body

of the Government Council for Human Rights, National Minorities and Gender Equality. In 2011, this committee was appointed by the Ministry of Social Affairs and Family to prepare a national programme for active ageing to be part of a comprehensive innovation programme (Krystoň, Kariková, 2015, p. 46).

Another key document adopted by the government engaged in lifelong education is the European Commission document entitled *Memo-randum on lifelong learning and the Lisbon Strategy for Slovakia* (2005).

There are also other organisations that take care of seniors in Slovakia: Universities of the Third Age, Academy of the Third age, retirement clubs and day centres. Now increasingly focused programmes on social organisations – education of clients in these organisations which further elaborate C. Határ (2008) have been implemented within the social facilities as part of the leisure and therapeutic activities, or custom of educational activities.

The University of the Third Age started its activities in 1990 (Hrapková, 2004). There are two models of education:

1. Segregation model – seniors do not study with young students.
2. Integration model – seniors study with young students.

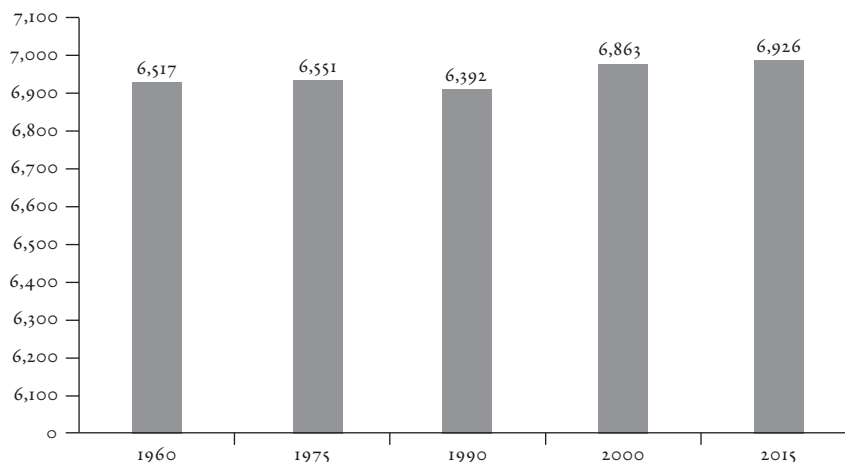
In Europe, there are two basic models of senior education – French and English. The French model focuses on senior education at universities, and the English model focuses on education in the private sector (Selecký *et al.*, 2014).

18.4

Universities of the Third Age

The organisers of study at Universities of the Third Age offer seniors interesting education by using the segregation model. Education at UTA can be defined as education in senior age but considering the age of seniors and possibility of admission to UTA in Slovakia, we can talk about older adults and seniors. The managers of UTA have to communicate with students aged 45 to 80+. In spite of the many problems that UTA have had in Slovakia, many nationwide conferences and workshops have been realised. The benefit is the cooperation with the Association of UTA in Slovakia and the European Federation of Older Students (EFOS), since 1998 has been the seminar “Gain of education for older people for the psycho-physical health of the human body”, as well as the seminar “Senior education and new trends in the third millennium” in 2002. UTA today leads several partnerships in

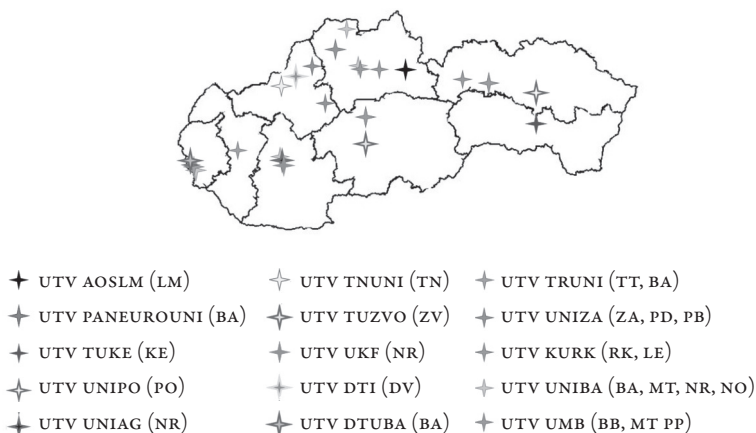
FIGURE 18.1
The number of students in Slovakia



many projects. The range of educational activities continue to innovate, expand and complement. The basis for new contacts and partnerships are mutual associations, Exchange and retrieval of information, solutions to common problems and current issues. The main goal of the geragogic conferences realised is to enable specialists in this field to meet new colleagues and know their work and form new working teams. Researchers present their current projects and trends in senior education, application of specific educational methods but also their plans for the future. Good practices are beneficial for the development of geragogical theory as well as practice in this field. UTA in Slovakia cooperates actively with the International Association of the Universities of the Third age AIUTA. There are more than 23 countries associated all over the world. According to the author R. F. Swindell (2012) UTA exists in more than 60 countries. AIUTA organises an International Congress biennially and supports development and cooperation projects of education in the third age. Another very important organisation dealing with education for elderly is WorldU3A, established in 1997. It focuses on supporting e-education (Swindell, 2012).

We use our own data collection about the number of UTA students in Slovakia. We take them every year from members of the UTA Association.

FIGURE 18.2
Regional distribution of UTA



We can see that the number of students has risen slightly in the period of the last five years. The regional distribution of UTA in Slovakia is also interesting.

We can say that there is a very small location in southern and eastern Slovakia. However, there is a large choice for students in Bratislava and Nitra. The most widespread network is in Žilina region.

18.5 Conclusions

The creation of individual educational activities takes into account specific age, state of health and habits. A quality programme is not only a necessary complement to the care of a person, but also a highly effective therapeutic tool for maintaining mental and physical condition. Appropriate selection of activities can serve as prevention, often as a way of learning something new. The creation of individual programmes is based primarily on human needs. Each programme should contain a little bit of fun and therapeutic effect, because only such activities that fully meet the needs of people are very popular and sought after. Therefore, when compiling educational activities, one must take into account the organisational elements such as

administrative organisation which is very important. In institutions and organisations that deal with implementation of these activities, we expect that the creation of educational programmes will help to develop a positive attitude and to gain the necessary, skills and habits for active and healthy lifestyle. The main task is to know the opinions and attitudes of the population, not to be indifferent. To find the space to implement new practices in education and use them to work actively. Education needs to be moved towards activation of humans. Every new piece of information has tremendous value.

Issues and Problems of Adult Learning in Ukraine

Artur Horbovyi

19.1

Introduction

Modern issues for sustainable human development have actualised new goals for society. The basis of this approach is the principle that the economy exists for the development of people, not people for the economy. This principle has identified a priority for adult learning that has evidently served for elaboration and implementation of educational programmes for adults. In this paper the author has investigated the issues and problems of adult learning according to the needs and specificity of the audience with regards to European standards.

The analysis states that in 1993 a man could master 1/1,000 of the existing information. In 2003 he could master 1/2,000 of it. Scholars say that in 2013 a man would be able to assimilate 1/4,000 of information. This means the increasing on the effective demand for scientific, technical knowledge to manage capabilities. In the 1970s the amount of scientific information doubled every 5-7 years. In the 80s this doubling took place every 1 year and 8 months. In the 21st century the amount of scientific information doubles in 1 year (<http://www.idss.org.ua>). We could see the rapid growth of scientific information from the end of the twentieth century until now. The aforementioned means that there is a need to modernise the system of education according to rapid changes and challenges that are constantly arising.

This paper aims to introduce the priorities for adult learning and new issues for the new quality that comes from the process of integration of formal and non-formal education in Ukraine.

19.2

Analytical framework

The basics for adult learning come from structured correspondence schools, distance learning, and open universities. Correspondence schools were first mentioned in Germany in 1856.

Then they spread in England where in 1886 a graduate-studies correspondence course was introduced. The first formal experience of correspondence schools took place in New York in 1883 in the form of the Correspondence University (<http://www.cedefop.europa.eu>).

Distance learning was developing as courses were prepared on a high methodological level by multidisciplinary teachers and managed by an education institution with a wealth of materials presented, as well as learning tutorials for teachers and students who were at a distance from each other. A well-known example of adult learning was the open universities that were generally based on distance study through radio, TV and the printed press. This form of adult learning became a mixture of academic culture and business activity, a sort of a platform for cooperation of experts and professionals from different spheres with a high level of efficiency. Improvements of adult learning in systems of formal and non-formal education as well as the implementation of educational programmes could form partnerships for all education contractors (Schultz, 1961).

There was a range for transition from traditional education for young people to adults. Particularly in Ukraine the growth of interest in adult learning as well as in the concept of the creation of its institutional basis to some extent was explained by the increase of an ageing population.

Ukraine is among the 30 countries with the oldest population. According to the forecasts, in 2061 the proportion of children in the population of Ukraine will be 14.9%, and those aged 60 years and older – 31.2% (in 2013 – 21.4%). According to the forecasts, age structures have three clearly marked groups (0-28, 29-59 and 60 and older). The share of population of age structure of 0-28 years is 30.2%; 29-59 years – 38.6%, and 60 and older – 31.2%, i.e. persons aged 60 and older may be more numerous than children and young people in the very near future (<http://www.unrisd.org>).

Nowadays the challenge is due to the identification of the ageing as a new form of “risk” in society, its role in creating new structures in the system of education are on the agenda. Different forms of integration of formal and non-formal education, in particular for adults, are in great demand in Ukraine. A key aspect of this has been the move from debates

that focused on ageing as a burden for national economies to perspectives that view population ageing as a worldwide socio-economic problem for human development. Education in the knowledge economy is a set of principles, decisions and actions of public facilities that are embodied in education programmes for adult learning and training/re-training practices to meet the needs and interests of social rights, social communities and society as a whole.

At each stage of development, the government sets special content and education policy priorities during the period of development of a state. Based on principles of quality of education, innovative learning is intended to ensure the development of the abilities, knowledge and skills of any person aimed at effective participation in society. It refers to the current goal to solve complex problems. Innovative lifelong learning focuses not on “yesterday’s” supply but on “tomorrow’s” demand.

This particular demand of tomorrow is caused by the development of non-formal education institutions that do not act systematically, often being in a situation of “survival” or “instability” in Ukraine. The well-known scientist V. Polterovich wrote: «We need to make institutional changes supported with measures to build institutional expectations and favourable government policy to stimulate growth» (Polterovich, 1999).

The problems of the quality of adult learning and its efficiency begin to be considered in the context of the changes that are occurring in society:

- The growth of consumer dissatisfaction with the quality of services in the system of formal education.
- Transition to the non-formal education system with high standards of quality.
- Increased demand for innovative teaching methods (the use of new tools in conditions of “devaluation” of diplomas and certificates confirming qualifications in formal education).
- Interest of employers in knowledgeable, talented personnel, which requires qualitative changes in education, enhancing the role of “knowledge economy”.

Ukraine is traditionally known as a leader in the number of educational institutions for people of all ages. According to the statistics, in Ukraine 45% of the workforce has been through higher education. Meanwhile, the quality of education raises questions. In the system of formal education there are the following indicators of its quality: knowledge, skills and availability.

In this connection the new issues of adult learning in Ukraine rise on the basis of new quality, in particular:

1. Subjective indicators of quality of education of different ages:
 - Maturity of reflection.
 - Manifestation of the activity.
 - Independence.
 - Initiative.
 - Desire to learn.
 - Ability to learn, etc.
2. Objective indicators of these:
 - Education in knowledge economy is a set of principles, decisions and actions of public facilities.
 - These indicators of quality of education are embodied in education programmes for adult learning and training/re-training practices.
 - Adult learning meets the needs and interests of social rights, social communities and society as a whole.

The new issues of the process for adult learning of new quality come from the process of the integration between Ukraine and European countries and require harmonisation of the approaches to formal and non-formal education.

In Ukraine there has been no national programme yet to support adult people in learning in following directions:

- Comprehensive human development in retirement.
- Assistance to adults to adapt to modern conditions of life through learning.
- Involvement of adult people in active life.
- Communication, implementation of the principles of active ageing, etc.

Promoting adult learning in national and regional programmes in Ukraine is of great importance because of the low level of awareness of adult people on the content of such programmes, lack of readiness of society to attract adult people not only to educational programmes but to an age-friendly labour market, low level of intergenerational culture of younger and older generations, and discrimination of people at retirement age. The innovative educational approaches for adult learning are becoming the long-term investment in human development and quality assurance. Innovative development of society and economy involves primarily the growth and self-realisation of the intellectual potential of the nation, creating conditions for the development of lifelong learning for employment and active life for adult people.

The solutions for adult learning in Ukraine are suggested at the following levels:

On the international agenda:

- Integration requires the harmonisation of approaches, in particular to adult learning of Ukraine and European countries.

On the national agenda:

- To set special content and education policy priorities by the state.
- To provide innovative pedagogic approaches to ensure the development of the abilities, knowledge and skills of any person aimed at effective participation in society.
- Innovative lifelong education focuses not on “yesterday’s” but on the “disturbing demand of tomorrow” to solve complex problems in society.
- There is no national programme to support adult students in learning in the following directions: comprehensive human development in retirement; assistance to adults to adapt to modern conditions of life through education; involvement of adult people in active life; communication, implementation of the principles of active ageing, etc.

On the national and regional agenda:

- Promoting adult learning in the national and regional programmes in Ukraine.

In conclusion some issues for formal and non-formal education for adults have been discussed. In Ukraine there are systems of post-diploma education for adults (in the system of formal education) and universities or centres for the “third age” (in a non-formal one). These forms are being developed as competitive, alternative systems. There is some adoption of formal educational institutions for the non-formal model. Sometimes formal and non-formal education are integrated into the broader concept and both serve for educational development.

It is necessary that formal education should analyse the reasons that led to this success and, if possible, incorporate many of its proposals, structures and programmes.

19.3

Closing Remarks

In view of these considerations, the problems of adult learning in Ukraine are to be solved by elaborating programmes for comprehensive human development in retirement; adults’ adaptation to modern conditions of life

by learning new modern knowledge; support for adults' inclusion into their active life; organisation of effective communication for them; implementation of principles of active ageing, etc. These issues are important for the Ukrainian present and timely, because now we are witnessing a policy of making social inclusion of those groups that are classified as excluded or are at risk of social exclusion.

In this paper the author could not say that only non-formal education is able to accumulate human capital and play a decisive role in the structure of the knowledge economy. Otherwise, on a historical scale it can be proved that today formal and non-formal education have not maintained their integrity for the system due to a lack of effective communication between them. At the same time, their modern forms of interaction precede the formation of a new system of education in a global context. Therefore, non-formal education is considered as very important in the context of its role in human development in the knowledge economy, not depending on its form or even its content.

In our opinion, the challenges for transformation of education to a holistic system (formal and non-formal) are closely connected with good governance performance. The aforementioned links are generated with the external socio-economic environment and inner motivation of a system of education new to institutionalisation. Therefore, non-formal education can serve as a persuasive package for the target citizens and make investments in human development. Viewed in this study, this approach is due to the fact that the formation of a link between formal and non-formal education as sustainable institution is a response to the socio-economic needs of society.

Anticipating education is based on new meanings of worldview, culture and training, which are relevant to a nonlinear world in its complexity and growing uncertainty. In this model of advanced lifelong learning knowledge, skills will find new content, in particular:

- Concept of constructive-organising knowledge.
- Ability to ensure survival, functioning and development of society in extreme conditions, including the ability to work in a team and independently.
- Crisis management skills that are updated promptly, including unconventional and technology, instrumental and operational approaches.
- Values to economic liberalisation of public interest, independence and initiative of citizens with the objectives of improving the efficiency of an innovative model of education.

Ukraine has declared its desire to join the European concept of education that provides continuous training. The integration of Ukraine into the European Union requires the recognition of non-formal education. The importance of training skilled and educated citizens goes beyond formal education. There is a need for an improved system of non-formal education in the creative space of modern knowledge. Citizens should have access to a system that identifies documents and certification and evaluates and verifies the authenticity of learning.

The gradual link of formal and non-formal education, requires, on the one hand, the emergence of non-formal institutions or, on the other hand, the gradual introduction of non-formal elements into existing formal structures and requires organisational and human resources, strategic decision making, preparing training materials and development plans, monitoring and controlled state support.

Social Integration of Ukrainian Ageing People

Anna Chechel, Ievgeniia Dragomirova

20.1

Introduction

Ageing people is the long-term problem for Ukraine. According to the general proportion (67,68.9 thousand people) of the total population (42,590.9 thousand people) in 2015 the number of ageing people is not really growing (FIG. 20.1). Ukraine with regard to the proportion of the population over the age of 60 years is included in the thirty “oldest” countries of the world. Ukraine occupies the rank of 25-26 (which it shares with Norway) for this indicator. The percentage of persons aged 65 or more years lags behind the average indicator for EU countries together, and is significantly far from the leading countries in terms of age (Italy, Germany and Japan).

The indicator of longevity in Ukraine corresponds to the Russian Federation but is 5-6 percentage points lower than in countries such as Sweden, France or Spain (<https://www.unece.org>).

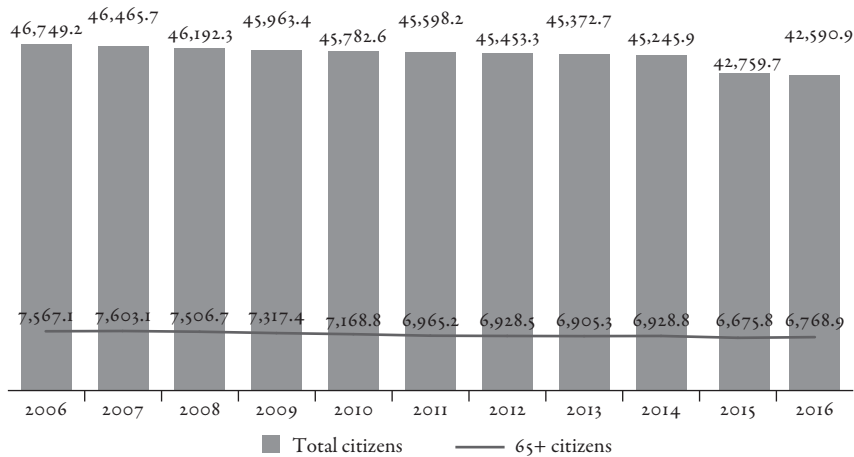
At the same time, those reaching retirement age are healthier and fitter than ever before. Increasing life expectancy and better health in old age are a major success and represent a potential in terms of working power, qualification and experience that societies need to use productively (<https://www.unece.org>).

European experience with “active ageing” shows that older persons who are integrated into society have a higher quality of life and longer and healthier lives. Societies need to consider more actively how to integrate older persons and ensure their participation in a cohesive society of all ages. At the same time, attention to older persons should not come at the expense of younger generations. Regardless of age, each person should be able to contribute to society (<https://www.unece.org>).

The modern situation in Ukraine shows that the older population might influence the new generation negatively because of their historical beliefs and

FIGURE 20.1

Estimated Ukrainian annual population, 2006-2016 (thousands of people)

Source: <http://www.ukrstat.gov.ua/>.

social effects. Even now, during the conflict between Russia and Ukraine, the large number of Ukrainians – 205,900 citizens, including tourists and refugees, moved to Russia in 2015 because there are no communication problems and not a big difference in legislation, mentality and rules of socialisation.

Universities of Third Age Education work collaboratively with others to help bring positive changes. According to a data base of the University of Third Age Education in Donetsk State University of Management, the authors notice it can be possible in only one way – by dialogue across the generations. Ageing people should be integrated into society by a process of building values, relations and institutions for a society where all individuals, regardless of race, sex, age, ethnicity, language or religion, can fully exercise their rights and responsibilities on an equal basis with others.

The Centre of Third Age Education practice intergenerational learning and activities with all grades of students in Donetsk State University of Management. TAB. 20.1 shows that intergenerational events that are most frequently attended.

Intergenerational workshops and events help to collaborate with ageing people, leave them feeling isolated and depressed, so it is fitting to work with Universities and Local Centres that work tirelessly to alleviate loneliness through communication and conversation, medical and social insurance.

TABLE 20.1

The percentage of events attended by all students

	Intergenerational events (100 %)		Events for ageing students only (% of the total number of students)	
Ageing students (%)	60	80	40	50
Bachelor's degree (%)	40	20	-	-

Donetsk State University of Management deals with all local centres in Mariupol which provide the following services:

- Social and personal services – stationary and home care, social adaptation and prevention, mediation and consultancy.
- Socio-economic services – providing humanitarian and financial assistance, natural resources and transport.
- Information services – providing the information/assistance in solving a difficult situation, cultural and educational knowledge (education services), dissemination of objective information about consumer properties and types of social services.
- Other social services (the order of the service list is determined by Mariupol city council).

The charitable assistance of the department implements municipal social programmes which cover 519 low-income citizens.

A monthly commission to identify people in need of a daily hot meal and receiving targeted assistance food packages at the district administration, considering the documents submitted, defines the right to and the period of receiving hot meals, according to the lists of needy citizens; for the period 2016-17, 17 needy citizens in the district received 514 hot lunches. Every person should be allowed to age in security and with dignity and be in a position to contribute to society in the most meaningful way. Such conditions are at the root of stable, safe and just societies where all members, including vulnerable ones, enjoy equality of opportunities. Integration and participation are therefore closely linked to the notion of social cohesion, a vital element of a healthy society. It denotes society's ability to ensure the welfare of its members, minimising disparities and avoiding polarisation and conflict, and it requires fostering solidarity and reciprocity between generations.

Innovation programmes for ageing people in the Local Centres in Mariupol include 3 faculties or directions: "Healthy Lifestyle", "World of Cinema", "Computers for Idiots". These directions based on traditional methods of teaching and training methods, presuppose 44 classes that were attended by 55 students.

The experience of collaboration between Local Centres and Donetsk State University of Management shows the need for mutual synergies in supporting an ageing generation activity. However, the mutual-synergy effect can be reached in cooperation work that should be divided in two directions: socio-medical and socio-educational. The territory and professional staff of the Local Centre can be useful for realisation of the socio-medical direction, which will extend active longevity and physical activity in society. Their work will help to select the participants for educational programmes which suggest the physical ability to participate in them.

Lecturers of Donetsk State University of Management can help to improve ageing people's literacy rate and upgrade existing knowledge and bring them up to the new generation. The teaching staff, modern computers and other technical equipment, new international teaching methods with the scientific language of mass communication could open new possibilities for ageing people. First of all, to those with children and grandchildren. Nowadays, there is a process of inter-generational distancing in family relations in Ukrainian society. The life strategies of older generations are perceived as insufficiently effective.

Socio-educational direction of work in the Centre of Third-Age Education in Donetsk State University of Management will help to increase the intergenerational interaction which helps to select, preserve, transfer, assign and proceed with experience of previous social activity, specific achievement of material and spiritual production, forms of communication, cultural values with a view to their further development and enhancement.

Intergenerational cooperation can be considered as the process of enriching experiences, diverse activities, contributing to the knowledge of themselves and others, to create an additional sphere of socialisation.

At the same time the formation of youth with respect for the cultural heritage as a factor of Ukrainian society development is one of the main tasks in the socio-educational direction of work in the Centre of Third-Age Education in Donetsk State University of Management. The constructive, emotionally refrained dialogue between elderly and young people requires the original bilateral openness and goodwill, desire to listen, understand and accept each other.

Public authorities can fully take advantage of the possibility of dialogue between the generational dialogue and form a package of social needs and requirements to increase the efficiency of social programmes.

Since the Ukrainian Government approved the Concept of the State targeted social programme “Youth of Ukraine” for 2016-2020 (30th September 2015). The purpose of the Concept is to create an enabling environment for youth development and self-realisation, the formation of its citizenship and national-patriotic consciousness (<http://zakon5.rada.gov.ua/laws>). Collaboration work between Government, Local Centres and Centre of Third-Age Education in Donetsk State University of Management will help to reduce the non-acceptance of the previous generations’ experience and follow priorities of older people in existing social and political conditions. The goals of these actors should be concentrated first of all on:

1. The formation of citizenship and national-patriotic education – implementation of measures aimed at the revival of the national-patriotic education, civic awareness and approval of an active vital position of young people.
2. Healthy youth lifestyle – the implementation of measures aimed at the promotion and affirmation of healthy and safe lifestyle and “health culture” of young people.

3. Development of non-formal education – the implementation of measures aimed at young people acquiring knowledge, skills and other competencies outside the education system, in particular by participating in volunteer activities directed to ageing people.

Local Centres and Universities as government institutions should promote and protect all human rights and fundamental freedoms, including the right to development, which is essential for the creation of an inclusive society for all ages in which older persons participate fully and without discrimination and on the basis of equality.

Combating discrimination based on age and promoting the dignity of older persons is fundamental to ensuring the respect that older persons deserve. Promotion and protection of all human rights and fundamental freedoms is important in order to achieve a society for all ages. In this, the reciprocal relationship between and among generations must be nurtured, emphasised and encouraged through a comprehensive and effective dialogue (<http://www.un.org>).

Dialogue is the main way of communication but it has barriers and in the ageing case there can even be the language. Ageing people in Ukraine hardly understand slang and IT-generation goals. At the same time, we have to admit that considerable obstacles to further integration and full

participation in the global economy remain for Ukraine. Unless the benefits of social and economic development are extended to all countries, a growing number of people, particularly older persons in all countries and even entire regions, will remain marginalised from the global economy.

As has been said in The Madrid International Plan of Action on Ageing and the Political Declaration, for this reason, researchers recognise the importance of placing ageing in development agendas, as well as in strategies for the eradication of poverty and in seeking to achieve full participation in the global economy of all developing countries.

Implementation process of the Madrid International Plan of Action on Ageing and the Political Declaration measures in Ukraine is carried forward by the Ministry of Social Policy, the Ministry of Economic Development and Trade, the Ministry of Education and Science, the Ministry of Health, the State Statistics Service, the State Service for the disabled and veterans and the State Centre for employment. The main commitment of this implementation process is summarised in FIG. 20.2.

FIG. 20.2 shows that promotion of lifelong learning and adapting the education system to the changing economic, social and demographic conditions is one of the main commitments and the Universities of Third Age Education can embody it in life and increase the level of old people's education.

The case studies covering Donbass region of Ukraine discovered 3 main goals of lifelong learning for ageing people (FIG. 20.3). The study course "Social work with third age people: international experience" launched by lecturers of Donetsk State University of Management presents certain aspects of foreign experience of social work connected with both social policy and social work.

The study materials introduce the historical and comparative approaches towards social work with older people in various countries. Scientists find out the goals of lifelong learning for ageing people in Ukraine (FIG. 20.3) which can help to solve the intergenerational problems and:

- Create conditions and promote the comprehensive development of the elderly.
- Reintegration of older people in active life.
- Helping older people to adapt to modern conditions of life through the mastery of new knowledge, including the ageing process, its characteristics, legal framework concerning the elderly and others.

Higher education received by older people in the Third-Age University, indicates the particular importance of this new socio-cultural phe-

FIGURE 20.2

Main commitment of implementation process of the Madrid International Plan of Action on Ageing and the Political Declaration measures in Ukraine

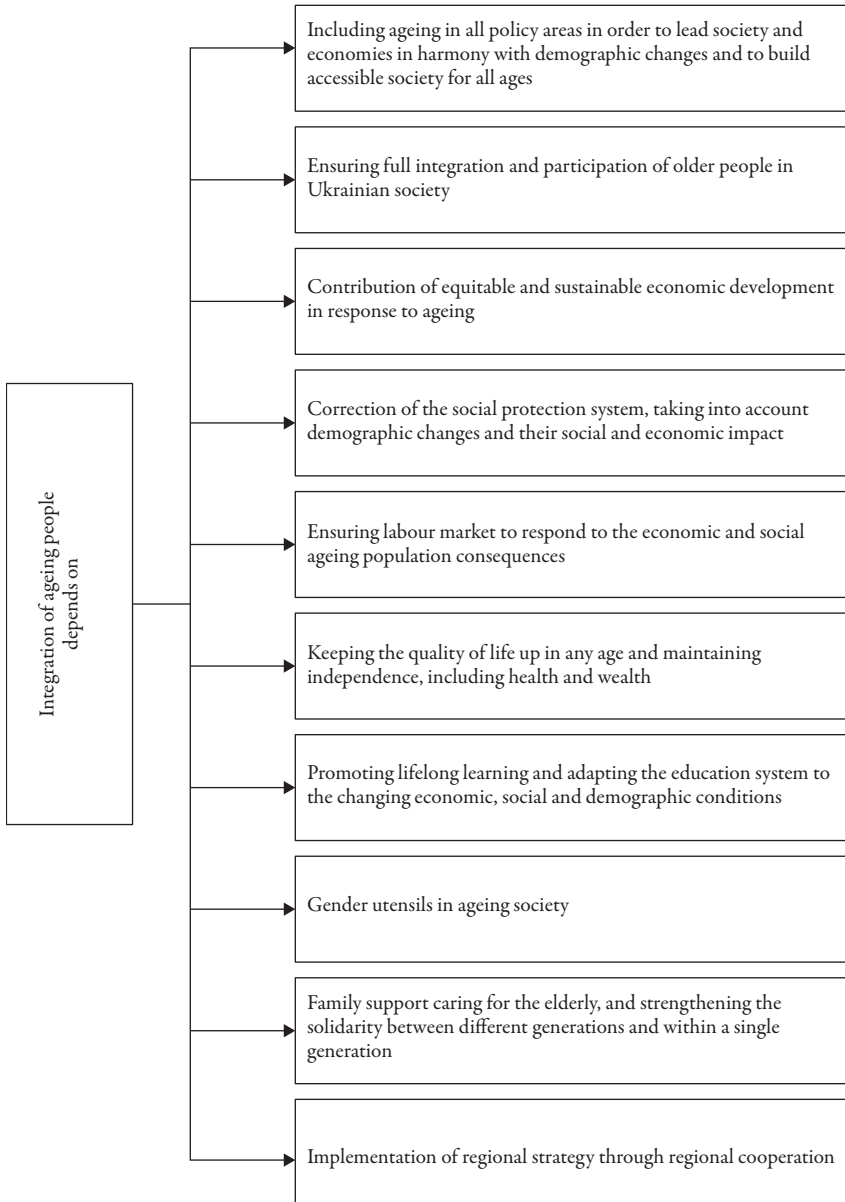
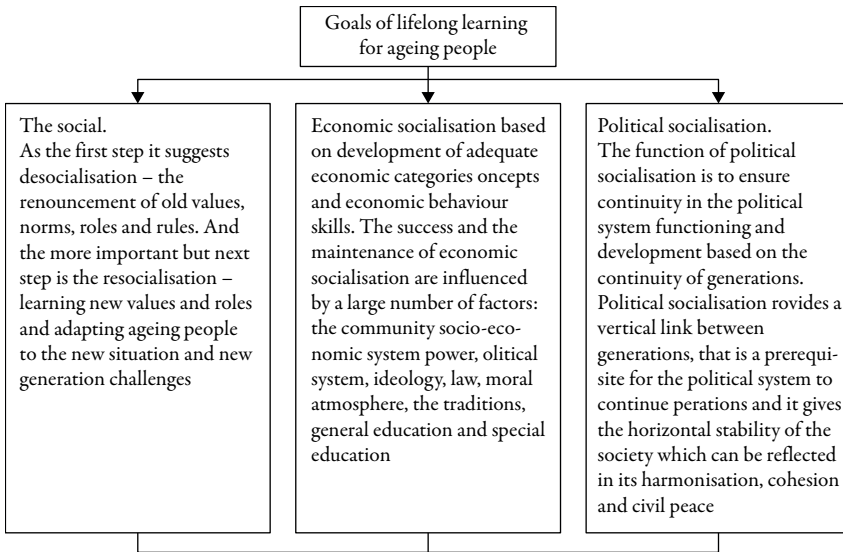


FIGURE 20.3

The goals of lifelong learning for ageing people



nomenon – the needs of older people in improving their intellectual level (Stoyka, Dragomirova, 2016).

There are 3 goals to complete the functional integration. Social participation refers to the integration of older persons into social networks of family and friends as well as their integration into the communities they live in and into society as a whole. Older persons play important social roles in assisting their children, taking on care responsibilities, performing household tasks or working as volunteers in the community. Their contributions in providing wisdom and advice to younger generations and the society as a whole should be acknowledged (<https://www.unecce.org>).

Functional integration is the part of UNECE strategy on ageing: to ensure full integration and participation of older persons in society. Mentioned strategies presume intergenerational relationships. To make productive use of resources and competencies available in society, older persons should be positively valued for the contributions they make. Ageing should be considered as an opportunity, and negative stereotypes should be addressed proactively. Rather than portraying older persons as a drain on the economy in terms of escalating health care and pension costs, the

positive contribution of an active, healthy and productive older population should be highlighted – from caregiving to starting entrepreneurial activities or becoming volunteers in their communities. Older persons are important repositories of a society's history and values. Such messages can be transported through special days or even weeks dedicated to older persons, via image campaigns or popular movies and through the mass media. Journalists may be trained and educated about how to avoid undesirable stereotypes and how to use appropriate language. Ultimately, the view of older persons will depend on their own actions. The way they are seen by others will also depend on how they see themselves. Ageing stereotypes are very often also self-stereotypes. Therefore, older persons themselves should be empowered to be self-confident and positive about their role, thus inspiring the related discourse (<https://www.unecce.org>).

The success of Ukrainian ageing people's integration in modern society has to be based on intergenerational relationships: media coverage and volunteering. For the practical integration of older persons, it seems warranted to pay more attention to the voluntary sector as a vehicle to facilitate intergenerational exchange. European countries offer financial support to volunteer organisations that offer help to older persons. Volunteers can play an important role in caring for older persons without close relatives. Voluntary initiatives may at the same time encourage older persons to use their knowledge and skills by volunteering themselves. Older persons make important contributions in the sector of unpaid support services in the family or in their communities. Some of these initiatives offer intergenerational art courses (Lithuania) or encourage the production of an intergenerational newspaper (Estonia) (<https://www.unecce.org>).

Ukrainian voluntary initiatives have developed nowadays and have political support. But in time it can be developed in great social motion in Ukraine and help the government in modern socio-economical renovation.

20.2

Conclusion

On the basis of the foregoing the Universities of Third Age Education may profit from international experiences and provide a platform for discussion between policy-makers, researchers and society. They will help to identify lessons for policy-makers and service providers to help them address the challenges ahead in Ukraine and bring the Ukrainian society to a new higher level.

Training-Needs Assessment as a Basis for Creation of Study Programmes for Third Age Persons

Diana Spulber, Tatiana Tereshkina, Svetlana Tereschenko

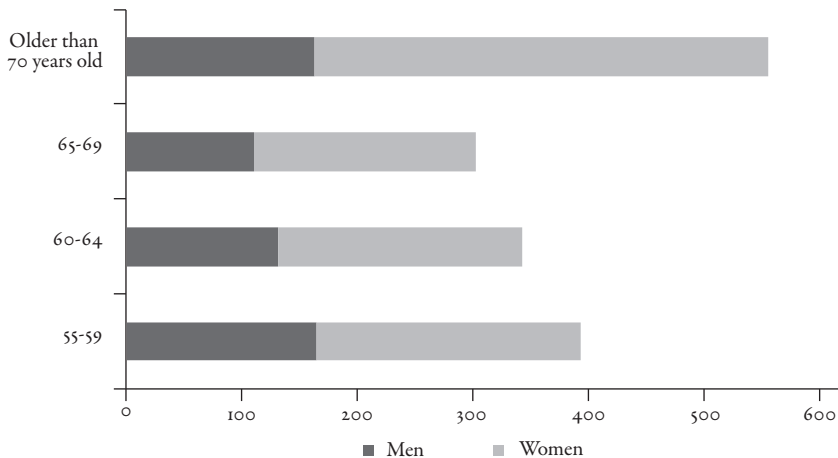
21.1

Demographic Situation in St. Petersburg

St. Petersburg is the third largest city (after Moscow and London) and the most populous city, which is not the capital of the state, in Europe. About 40% of residents have a high-level of education. In St. Petersburg, as well as in most European cities, the number of older people is increasing. This is connected with demographics and with the improvement of medical care of the older generation. connected with demographics and with the improvement of medical care of the older generation. In St. Petersburg on 1st

FIGURE 21.1

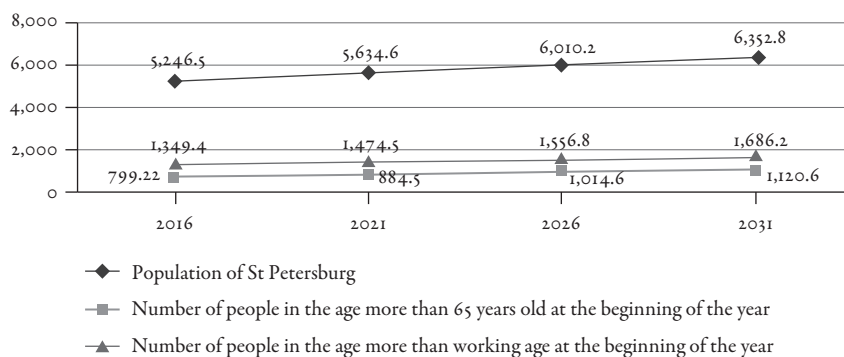
The structure of population older than working age by sex and age (thousands of people)



Source: Federal State Statistics Service Russia (ROSSTAT); www.gks.ru.

FIGURE 21.2

Forecast of population of St Petersburg (thousands of people)



Source: Federal State Statistics Service Russia (ROSSTAT); www.gks.ru.

January 2016, 1,540.42 thousand people aged over 55 years lived, which is 29.48% of the population (<http://www.petrostat.gks.ru>). The division of this group by age and sex is presented in FIG. 21.1.

Data presented in figure 1 show that the maximum number of people is in the group older than 70 years. There are more women in all age groups than men. Then, if the number of women in the age group 55-59 years is 1.5 times more than men, in the group older than 70 years, this figure is more than 2.5 times. According to the demographic forecast until 2031, the population of retirement age will grow (FIG. 21.2). The dependency ratio showing how many persons in the age more than working age will be for 1,000 persons of working age will be 453 in 2030.

21.2

Main Providers of Education for “Third-Age” People in St. Petersburg

Much work for third-age people is organised by complex centres for social services and concentrated in Social-Leisure Departments. Such centres are organised in each district of St. Petersburg. Social and Leisure Department of complex centres of social services focus on the elderly by place of residence. Their task is leisure activities, socialisation and socio-psychological

support, overcoming the isolation of certain parts of the population, the preservation of the continuity of the work day-care centres etc.

The main features of these centres are: the proximity to the place of residence, practically free for population services of the professionals, the emphasis on group work and events and a good knowledge of their needs. Educational programmes for third-age persons in St. Petersburg on the basis of the Social-Leisure Departments of complex centres for social services are organised by providing different courses. Most popular are: Computer Literacy, Handicrafts, Dances, Singing and Foreign languages. The government of St. Petersburg pays special attention to the training of senior citizens' computer literacy. In 2009, the city began to organise computer courses for older people in Social-Leisure Departments of complex centres for social services. In August 2013, courses, schools, clubs and advice on computer literacy for older people were organised in 37 Social-Leisure Departments of complex centres for social services. Computer courses in the district accepted the senior citizens living in the area. Electronic manuals provide all the necessary information about existing computer schools and courses for older people on the basis of Social-Leisure departments in different parts of the city.

Libraries began to organise educational programmes for third-age persons about 10 years ago. During the last four years, the public libraries of St. Petersburg have paid special attention to the training of computer literacy in citizens of the older generation. There were functioning computer courses in schools in 76 public libraries in St. Petersburg in June 2014. Residents of all districts of St. Petersburg and the Leningrad region can learn how to use a computer in the city central public library named after V. V. Mayakovsky, in the central city children's library named after Pushkin and in the state library for the blind. Computer courses are also organised in the centralised library systems (CBS) in which senior citizens, regardless of area of residence can take part. On the basis of libraries, different clubs and courses are also organised, such as literature lovers, poetry lovers, singing and so on.

21.3

Schools for Third-Age Education

The most popular school for people of the third age in St. Petersburg is located in the Nevsky district. For 9 years it has been engaged in third-age persons' education and has tried to involve them in an active social life. The students are free to participate in various activities: from painting to

biking. In September 2004, a charitable non-governmental organisation for civic education “House projects” began by creating a “School for the third age” in Nevsky district of St. Petersburg.

It represents an innovative model of social work with older people. The relevance of the programme contributed to the fact that it has been included in the new unit “Complex centre of social services of the population of the Nevsky district” – social and leisure department for elderly citizens. On 28th February 2005, the “School of the third age” celebrated the day of its birthday. Any retired person living in Nevsky district may become a student and attend those classes that are interesting to him (her). The school has undergone many changes since its foundation.

Educational programmes tailored specifically to work with older people. In addition to training sessions, tours around historical and cultural places of St. Petersburg, Leningrad region and to other places are organised. A great number of social projects have been implemented for elderly people with the support of the school. The students of this school have been involved in numerous city events. The research participants took part in the project of the film festival “Third age – new opportunities”. Artists, who graduated from applied art courses, participated in the annual festival of crafts in the framework of the international forum “Senior generation”. In January 2014, the members of the school took part in the charity event “The mitten. Give heat”, which was organised by the foundation for assistance to children-orphans, the association “Help” and the museum “The mitten”. The school has its own print edition “Wosr@stu.net”. The materials printed in the magazine are written by the students about how they live, what interests them, what inspires them. Different interesting people, whose life is full of events and impressions, study at the school of the third age. The attraction of enormous life experience of older people in the educational process is a feature of the school.

The other school, which is working with elderly people, is the school of the third age in Central District. It is designed to provide an opportunity for participants to feel able to learn something new, to be future-oriented, to become modern and to keep up with society (<http://www.seniorschool.ru/>) There are several faculties in the University: 1. Faculty of Information Technologies; 2. Faculty of foreign languages; 3. Faculty of Handicrafts; 4. Faculty of art and culture; 5. Faculty of health.

The courses that are suggested:

1. The course “Competent user of mobile communication” and “Photo-shop”. At the faculty of information technology training is not limited to

learning the basics of computers. Here, they are also studying graphic programmes, rules on the Internet that may become a new fun hobby or even a new profession.

2. Courses of foreign languages. Knowledge of foreign languages significantly expands communication skills no matter whether you are going on a trip or are in correspondence with a foreign friend from home. This also allows memory training in this way. In any case, learning a language will become indispensable.

3. Courses “Discover the artist in you”. If there is unspent creative potential in a retired person, s/he may discover a little known, but interesting details of the history of his/her native area.

4. Course “Basics of a healthy lifestyle”. This course is interesting for those who lead an active lifestyle, who are not ready to become old. Teachers of the Department of health-educational work will offer this and other courses that help maintain good physical shape, good spirit and good mood.

Online, the University of the Third Age was created on the basis of the St. Petersburg national research university of information technologies, mechanics and optics (NRU ITMO) which is one of the leading universities in Russia in the field of information and communication technologies (ICT). The main objectives of the university: formation of information culture of the older generations in Russia; creation of high quality and affordable distance education for adults; bridging the digital divide and socio-cultural exclusion of older citizens. The basis of the university is the first Russian learning portal for the elderly (<http://www.u3a.niuitmo.ru>).

Currently, the university is developing in the direction of creating in St. Petersburg the National resource centre for distance education for various categories of the adult population. One of the most important functions of the resource centre is to disseminate the best practices of involving representatives of all ages in cultural and social life through education using ICT. The resource centre aims at providing methodological assistance to social workers, organisers and practices of education, volunteers and staff of non-governmental organisations working with seniors, so in the future it will contain a description of the methods, techniques and innovative approaches in the work with the target audience.

The other university of third-age people in St. Petersburg is called “Silver age”. It is organised for seniors over the age of 55 years. It is designed to address key challenges facing any elderly person who has attained a venerable age.

In conditions of economic crisis, when reduction of staff becomes inevitable, candidates who first lose their jobs are persons of retirement and

pre-retirement age. Of course, responsible employers provide their employees with financial support. However, the main problem they have is not money, but the fact that after many years, when they had been in a team and in demand, some kind of “emptiness” has been formed. It is difficult for such people to find a new direction in their lives and have something to do. The ability to focus on private life (raising grandchildren, family chores and gardening) do not cover the internal needs and interests of older people. An adaptive learning programme was developed for retirees and people approaching retirement age in the University for third-age people “silver age” to solve these problems. Simultaneously at the university in St. Petersburg there are more than 300 people who continue their education for 6 months, and then most of the students of the university become members of the “club of volunteers”, alumni and other forms of post-graduate work. Thus, to date, the number of graduates who continue contacts with the university is estimated at about 1,000-2,000 people. The educational activities of the university include: activity in the choice of subjects of study; the ability to take the initiative; development of creative abilities and curiosity; development of new fields of activity, suitable for the current needs of the elderly and the current time; the opportunity to participate actively in the social life of the country, acting as a volunteer that promotes self-determination and self-realisation of the elderly.

The university helps senior people to be involved in an active life and to use their professional experience, which they had in working life. The solutions to the problems of third-age persons in the classroom at the university contribute to a culture of adult education, cultural activity, and self-acceptance in the “silver age”, on the one hand, and form a positive attitude towards age as full and interesting. University helps to understand that old people can be useful in the life of society, because of their life experience. It is a factor of improving quality of life and longevity.

The training programme uses interactive methods, modern technologies and learning tools, which enable older people in a circle of like-minded people to find new meaning in life, to acquire the knowledge needed to improve the quality of life, to assess their own internal resources and on their basis to build new life goals.

In accordance with students’ feedback, the programme allows students to learn the discipline necessary to improve the quality of life in old age and to develop ideas for future cooperation with fellow students, to develop and implement, in accordance with the needs and interests of the students, socially significant projects. The training helps them to improve

their health, have a more positive life attitude and to continue life under the motto at “60 years life is just beginning!”

The contribution of the elderly in the scientific-technical, social, cultural and educational creative potential of St. Petersburg can hardly be overestimated. The use of the creative potential of older people is not only associated with obtaining socio-economic and socio-cultural effects, but with the possibility of solving the problem of sustainable development of St. Petersburg. This requires knowledge of the laws of interaction of generations in a transforming society. The opportunity to increase the adaptive capacity of different generations depends on the social controls and social mechanisms of interaction between generations. Unfortunately, this problem is poorly studied from a scientific perspective, but practice is always ahead of theory, and offers new and effective solutions. Programmes aimed at the connection of generations have been actively developing and implemented in St. Petersburg in recent years. They, of course, require scientific analysis and further development.

In the frame of sustainable development of St. Petersburg, not only should the features of adaptation of different generations to the conditions of developing city and society be taken into account, but also multi-dimensional, multivariate relationships existing between generations. It is especially important because the city needs to use the personal and professional experience of third-age persons in St. Petersburg. That is why it is necessary to take into account the following factors:

- Society is currently faced with a shortage of labour; this trend will dramatically increase in the future.
- A significant proportion of older people has invaluable personal and professional potential, the use of which is economically and socially important.
- Many older people are still learning and their motivation is a need to make practical use of new knowledge in combination with their former professional potential, which creates conditions for the prevention of intellectual decay and strengthens a more productive independent position in society.

Analysing the behaviour of older people in St. Petersburg, it can be concluded that a large group of third-age people has a need to continue learning, gaining new knowledge. They are actively participating in different courses and universities for third-age persons. The programmes for such people are made in connection with such important factors as education of adult learners, professional status of the person in the present and the past, gender differences, reflective capacity to adequately assess the possibility of their participation in specific social and socio-educational

programmes. The providers of the development and implementation of such programmes in St. Petersburg are state organisations, public organisations, including veteran organisations, universities of the third age, folk high schools, clubs and libraries.

Ideas for active ageing in St. Petersburg can be developed only under conditions of adequate perception of ageing and images of older persons. Among the main tendencies in active ageing in St. Petersburg we can mention: a reduction in discrimination against old people working, expanding their opportunities for education, retraining, and new incentives for formal and non-formal education and more intensive use of the potential of informal learning in recent years. In this framework, third-age education is developing in St. Petersburg nowadays.

21.4

Analyses of the Training Needs of Elderly Generation in St. Petersburg

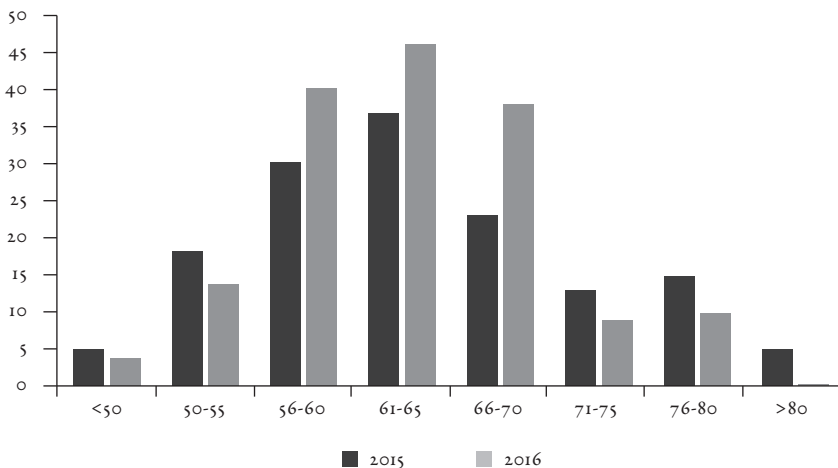
Based on the existing activities in the framework of education for third-age persons, before organising an educational process in the Institute for Third-Age education of SPSUITD a training needs assessment of the needs of the people from the third-age generation was organised based on a questionnaire. It was given to the participants of the St. Petersburg International Forum “Elderly generation” in 2015 and 2016. The respondents who answered the questionnaire were those who came to the exhibition stand of the Institute for Third-Age education of SPSUITD.

The first result of the investigation is that the number of respondents increased in 2016 compared with 2015. The number of respondents rose 9,5 %. This shows that education for third-age people is becoming more and more demanded by elderly people.

The age structure of the respondents in 2015 and 2016 year is presented in FIG. 21.3. It can be seen that in 2016 people whose age was more than 80 years old did not participate in the investigation. The main reason for this is that in 2016 the venue of St. Petersburg International Forum “Elderly generation” was changed. In 2016 this event was organised outside the city and it was difficult for the people who are 80 years old to get there. It can be concluded that the total number of respondents increased because the number of respondents increased in such age groups as 55-60, 61-

FIGURE 21.3

Age structure of the respondents who participated in the investigation



Source: elaborated by the author.

65 and 66-70 years old. But in the younger and older age groups the number of respondents in 2016 was less than in 2015.

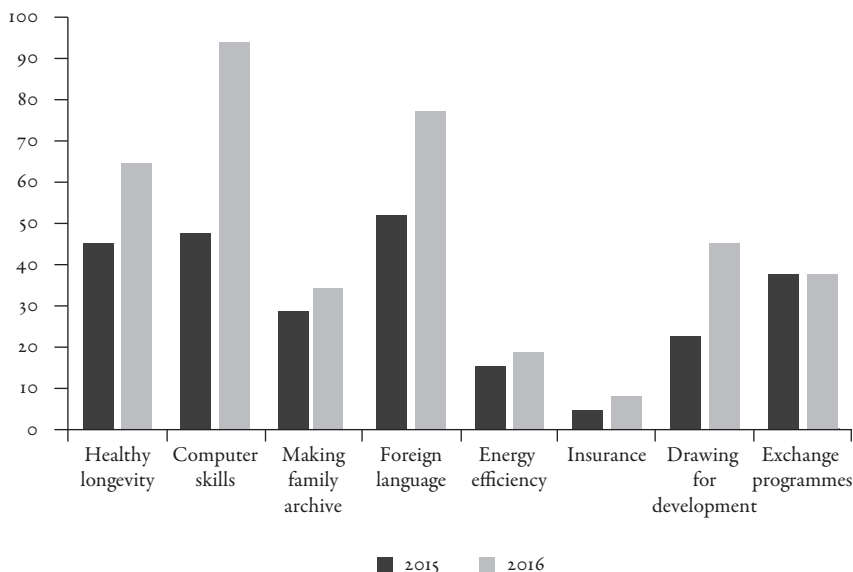
One of the main aims of the investigation was to understand which courses may be interesting to third-age people. In the questionnaire there was a list of courses that could be organised by the Institute for Third-age education of SPSUITD. The results are shown in FIG. 21.4.

The survey showed that the most popular educational courses in 2015 and 2016 were the same: healthy longevity, computer skills, foreign languages, exchange programmes with foreign universities of the third age. The investigation conducted in 2016 showed a large increase in the number of people who would like to participate in the courses “Computer skills” and “Drawing for development”. It can be concluded that despite the amount of offers for computer courses for elderly people in St. Petersburg, there is still demand for such educational courses.

To organise the educational process effectively in the Institute for Third-Age education of SPSUITD it was decided to try to understand how often old people would like to study. That is why the question “How many days per week you would like to study” was included in the questionnaire.

FIGURE 21.4

Respondents' preferences for the educational courses in the Institute for Third-Age education of spsuitd



Source: elaborated by the author.

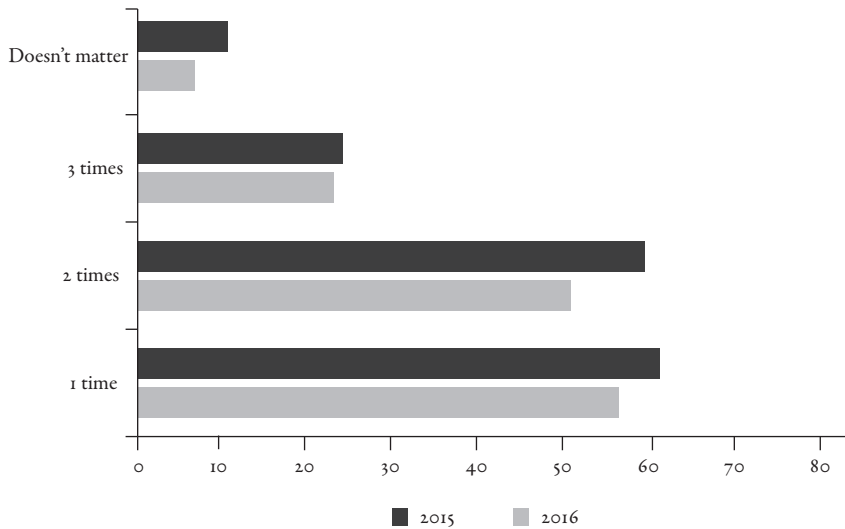
The investigation showed that the largest group of respondents is ready to study either 1 or 2 times a week. Both in 2015 and 2016 the situation is the same. The preferable time when elderly people would like to study in the Institute for Third-Age education of SPSUITD is shown in FIG. 21.6.

Preferably, the time for elderly people is day time both for men and women. The largest group of them would like to study in the period from 12.00 to 17.00. In 2016 it was a new question in the questionnaire, connected with the willingness to participate in the intergenerational programmes. The results of the investigation based on the answers of the respondents are shown in FIG. 21.7 and FIG. 21.8.

The largest share of those who would like to participate in the intergenerational programmes are in the group of 56-60 and 61-65 years old for women. For men the largest group of those who would like to participate in the intergenerational programmes is 65-70 years old. But the share of those who would like to participate in the intergenerational programmes is not so large as it is about 30% for both men and women.

FIGURE 21.5

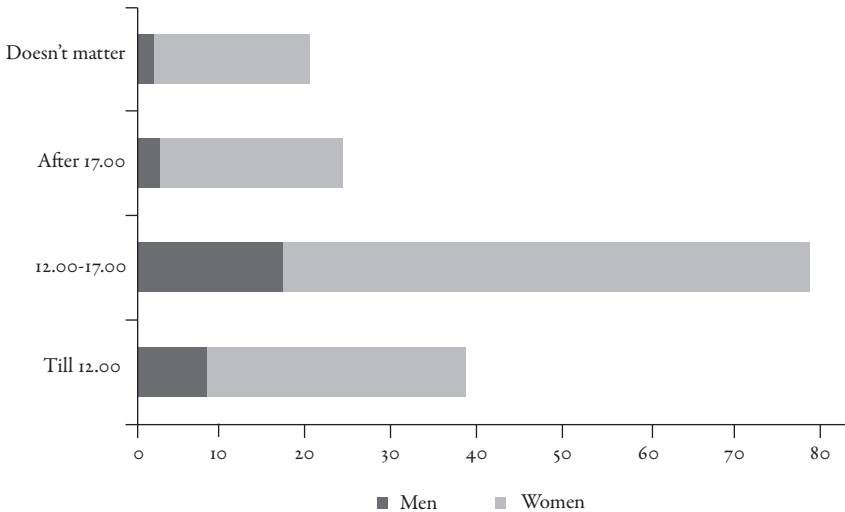
Preferences of respondents in number of study days per week in the Institute for Third-Age education of SPSUITD



Source: elaborated by the author.

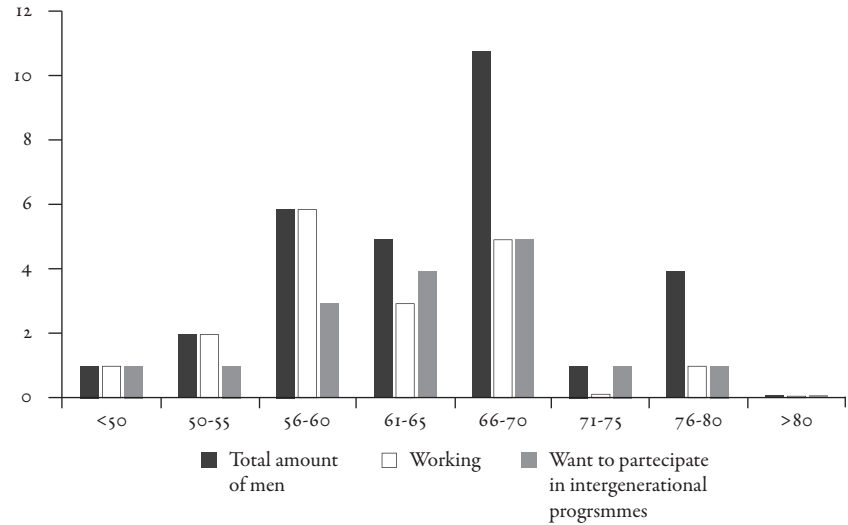
FIGURE 21.6

Respondents' preferable time for organising courses for elderly people in 2016 in the Institute for Third-Age education of SPSUITD



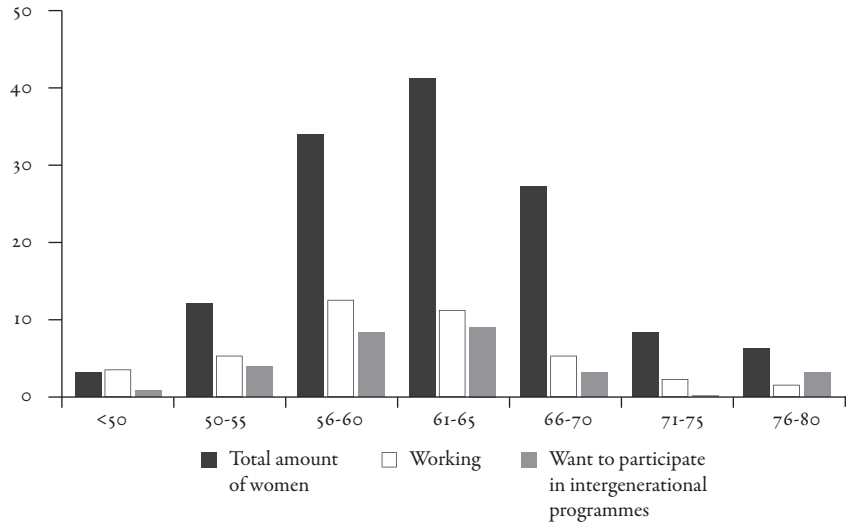
Source: elaborated by the author.

FIGURE 21.7
Men, participating in the investigation, who would like to participate in the intergenerational programmes



Source: elaborated by the author.

FIGURE 21.8
Women, participating in the investigation, who would like to participate in the intergenerational programmes



Source: elaborated by the author.

21.5
Conclusions

The results of the investigation were used in planning the educational process in the Institute for Third-Age education of SPSUITD for the 2016-2017 academic year. All courses that are needed for the educational market by third-age persons were included in the curriculum. The number of courses “Computer skills” and “Drawing for development” were increased per year in 2016 because they are more in demand by persons of the third age. After each educational course, the questionnaire was given to each participant to have the opportunity to receive feedback from him or her. The results were used for the development of the educational process in the Institute for Third-Age education of SPSUITD.

Centre for Third Age Education in VRSUS: First Experience

Anna Kara, Elena Kuznetcova

22.1

Introduction

Age is an important characteristic for each person. However, very often the elderly do not fear the ageing process. They worry about age-related stereotypes which are prevalent in society and limit their abilities. Old age is not an obstacle to the personality's preservation and development, its spiritual and physical health. A dignified anility depends mainly on people's efforts at self-development throughout life and cultural level reached. It can be characterised as a complex and diverse condition of a person, reflecting his own feeling about age, development capacity and environment enabling its implementation.

Humanity seriously began to think about the population ageing process in the late 1950's of the 20th century, namely in 1959, when the experts of the Demography Department of the United Nations Organisation adopted the limit of 65 years to measure demographic ageing processes. It is connected with the fact that in Western Europe and some other countries, the majority of the population retires at this age. It should be noted that concern for the social consequences that emerged at the first signs of population ageing, has been revealed by the Western European countries' governments since the 1960's of the last century, and at the beginning of the 1980's of the same century, signs of concern began to be noticed in almost all countries of the world (Yatsemirskaya, 2006).

Population ageing is an irreversible global process, which demographers have defined as a phenomenon of the 20th century, saying that the world has entered "the age of the elderly". In 1982, the first world Assembly of the United Nations Organisation dedicated to ageing was hosted in Vienna. In the framework of the Assembly it was recognised for the first time, that the process of population ageing had adopted a global charac-

ter and could be seen as one of the primary problems for humanity. For economically prosperous countries, this problem has been at the centre of all discussions and speeches. The idea adopted by the Assembly for an International plan of active ageing contained recommendations in six areas: health and nutrition; protection of elderly consumers; housing and environment; social security; the provision of income and employment; and education.

The main obstacle in the implementation of these recommendations for many countries was the lack of funding. However, it can surely be said that the Assembly greatly increased interest in the elderly, and more importantly, a need was recognised for the development of state social policy in respect of the older generation.

From 8th to 12th April 2002 in Madrid the Second World Assembly dedicated to ageing was held. Demographic data presented testified that the world was undergoing a demographic transformation: today every 10th person in the world is older than 65 years, so the number in this age group is about 629 million people. In 22 developed countries, the share of seniors in a similar population will exceed 17%. According to forecasts, by 2050 every 5th person will relate to this age group and for the first time in the history of mankind their number will exceed the number of children under the age of 15 years (Yatsemirskaya, 2006).

At present, Russia is in 135th place for life expectancy for men and 100th place for women; 125th place on the increase in life expectancy and 198th place in the rate of natural population increase in the world. In 2016, Russia's overall life expectancy was 70.93 years, including 65.29 years for men and 76.47 years for women.

Hence, age and sex difference in life expectancy is more than 11 years, which is completely abnormal. There is a unique phenomenon in the country – the excessive mortality, which is caused by mass poverty, civil and ethnic conflicts, with a sharp increase in the incidence. There is a significant mortality growth among young people aged 15-19 years.

If this demographic situation in Russia continues, only 54% of the current 16-year-old boys will live to 60 years, which is less than 100 years ago when it was 56% (Alifanova, 2014).

In these conditions, society's ageing makes new demands on older people. The current level of socio-cultural development of Russian society suggests, and in some areas requires, their participation. The problem of old age is relevant not only for the elderly but for society as a whole, which

is seeking ways to harmonise the natural processes of population ageing with economic and social objectives in conditions of demographic crisis.

Currently, in most countries some progress has been made in the development of national infrastructure which is associated with ageing: improving health and housing conditions, financial security of elderly people and their participation in society. Needless to say, in different countries the level of these achievements is different: the richer the country is, the better living conditions created for old people are. However, almost everywhere laws, programmes and projects are put into action related to the elderly's welfare improvement. An undoubted success is the fact that after the First World Assembly dedicated to ageing, many universities, institutes and secondary schools introduced the study of gerontology and expanded the scope of research on ageing (Yatsemirskaya, 2006).

Due to the trends mentioned above in relation to the growing number of third-age persons and economic and social difficulties, the problem of seniors' socialisation has great importance not only globally, but also at the level of separate countries. Russia is one of the largest countries in the world geographically, so in terms of population, where the share of retired persons is more than 20% with stable growth. This necessitates the development and implementation of economic and social support measures for older people to ensure their active life position and form their "necessary" status in society.

As we noted, due to limited financial resources, Russia does not have sufficient capacities for the full implementation of activities aimed at improving the older generation's situation. In this regard, the assistance of the European Union with financing, organisational and informational support for social and educational projects and programmes' realisation, particularly for third-age persons, is invaluable. The special importance of such projects is acquired due to the global implementation of the concept of continuing education throughout life.

22.2

Creation of Third-Age Education Centre at Volga Region State University of Service

Since 2013 the Economics and Management Department of FSBEI HE "Volga Region State University of Service" among the partners from Italy, Scotland, Portugal, Slovakia, Malta, Poland, Spain, Ukraine, Azerbaijan

and universities from Saint Petersburg and Samara has been a member of the international grant “TEMPUS” (project number: 544517 – TEMPUS-I-2013-I-IT-TEMPUS-JPHES “CTAE”), whose main goal is the development of universities of the third age on the basis of higher educational institutions.

The Centre for Third-Age Education – a structure which is focused on working with older people through the organisation of educational and training courses, creative workshops, course training on various programmes, assistance in obtaining services through the disclosure of internal capabilities and needs for forming active life position and satisfaction – was created by the decision of the Academic Council of FSBEI HE “Volga Region State University of Service” of 15.10.2014 No. 3.

Our study showed that the most popular faculties for teaching students in the Centre for Third Age Education in VRSUS are:

1. Law and Economics.
2. Basics of computer literacy.
3. Basics of Internet communications.
4. Culture and applied arts.
5. Orthodox culture.
6. Sport and health.

These faculties of the Centre for Third Age Education in VRSUS are fixed in the position of structural unit.

The staff from VRSUS' Centre for Third Age Education studied the experience of the Centres for third-age education of the TEMPUS project CTAE partner-countries provided by the project educational mobilities. So, it was decided to base training programmes and course preparation and implementation in VRSUS' CTAE on it with the following aspects:

- Third-age Europeans are active users of Internet and computer technologies, which positively distinguishes them from Russian seniors and facilitates socialisation. Computer literacy and Internet technology courses are among the most popular in the European Centres for third-age education.
- A significant place among activities of the Centres for third-age education belongs to cultural and leisure activities, including sporting and entertainment events.
- There is an element of payment as a registration fee or for additional specialised courses, academic year or semester.
- CTAE students' self-organisation, assuming the next questions' decision: information exchange about Centre's events and activities, participation in their organisation and conduction, fee collection, course selection, advertising the centre and its activities, forming study groups.

We believe it is important to note that in all Centres for third-age education, which we visited with training purposes in the framework of EU TEMPUS project CTAE, all courses are developed according to the students' interests. Firstly, a survey was conducted to identify priority areas and topics for study and then the programmes are developed. This is a very rational approach because it allows avoiding unnecessary teachers' and centre's staff time expenditure to develop programmes that will not be popular among students.

Based on the acquired experience within the European Centres for third-age education, at the beginning of the first VRSUS' CTAE academic year we took the following steps to organise its activities:

- We created a page Centre for Third Age Education (http://www.tolgaz.ru/activities/tretii_vozrast/) on the VRSUS' website. It contains a posted questionnaire, so filling it in allowed students to enrol themselves in the faculty concerned.
- Information with CTAE director's contacts about students' admission was posted in the district centres of social services, public reception offices of the deputies and the "United Russia" party, city polyclinics and on means of transport.
- VRSUS' staff and students were told about the beginning of CTAE work and students' admission.

After the groups had been formed, we carried out a questionnaire survey to identify students' interests and develop training programmes. The results showed that the majority of respondents expressed an interest in faculties "Basics of Internet communications" and "Basics of computer literacy" because of the realisation that training in a computer class allows not only to spend free time, but, above all, faster adaptation to modern conditions of life, gaining confidence in their abilities and realising their potential.

The second ranked faculty, which the seniors showed interest in, is the faculty "Sport and health". Its programmes were planned to realise with the participation of teachers from VRSUS' Physical training Department and the Department of disease prevention, open lectures with the representatives of the health system in Togliatti according to a prior agreement and Alifanova, candidate of medical sciences, associate professor, who has practical medical experience and is a teacher from the Social-cultural activity Department in VRSUS.

The interest of the respondents in the faculties "Economics and law" and "Culture and applied art" within our study was marked as 30%.

However, while forming groups to enrol students in a course there was a situation when the results of the survey and a real interest of an audience for the programme did not correspond. So, admission of trainees to the faculties “Sport and health” and “Economics and law” did not happen because those who participated in the survey, a real desire and willingness to attend the programme showed in fact only 2 people per faculty. Students abandoned as a practical component of the courses (exercises and gymnastics, analysis of economic situations) and so the theoretical block (lectures). Such a size of groups is economically inappropriate for the university, so it was decided not to pursue courses.

As for the faculty “Culture and applied art”, the initial small group of 7 people within the educational process expanded to 14 people for master-classes of the creative workshop “Granny’s chest” held by its leader Marina Ostroushko and separated as an independent group of the same number for the course “Basics of art”.

We decided that students of the Centre for Third Age Education in VRSUS could visit different faculties and training programmes which may include lectures, seminars, excursions, workshops and other educational forms.

At the end of the first academic year at the Centre for Third Age Education in VRSUS a repeated survey was held that helped to identify the audience’s interest in the history of the Samara region and its cultural and historical places. In this regard, the second year in VRSUS’ CTAE began with a trip to the Kazan Holy Mother of God’s men’s monastery (Vinnovka village, Samara Region) and is currently being implemented through students’ participation in a free programme “Public guide”, which is focused on combining wellness and hiking trips around the city with the “Finnish walk” technique with specially trained guides. The programme is supported by VRSUS. During the 2016-2017 academic year according to the students’ wishes, it is also planned to hold the course “Rural tourism”, developed by the teachers from the Tourism and Hospitality Department.

22.3 Conclusion

However, as any undertaking, the functioning of the Centre for Third-Age Education in VRSUS in the first year faced a number of problems. The main ones in this case are the following:

- *The appropriate period to conduct classes in CTAE is from the beginning of October to the beginning of May.* In Togliatti, the older generation attaches particular importance to maintaining subsistence farming-dacha. Dacha's season in our region begins in April and ends in early October. Practical experience showed that despite the results of the participants' preliminary survey about optimal timing for the classes within CTAE and seniors' willingness to attend them after the 5th May, even the most active students began to miss classes because they needed to work on their dacha and wanted to use summer vacation in order to visit family and friends in other regions.
- *Limited financial resources of potential target audience that is especially important in conditions of economic crisis.* At the first meeting with potential students of the centre they were informed that the establishment of the centre and its work was only possible due to a grant of the European Union TEMPUS, which is implemented in VRSUS by the Economics and Management Department. Seniors were also informed that the first group in the framework of project would be trained free of charge. In the long term to ensure payback of the centre's classes, it will likely be conducted on a paid basis. The cost of training in a specific programme will be calculated based on the number of students enrolled and the possibilities of attracting sponsors or volunteers. In this regard, to determine the financial capacity of potential listeners, we carried out a survey that was focused on obtaining information about the possible amount of payment for the older generation for the training programmes. As shown, in the first year of operation, most students (about 90%) are not ready to attend training programmes on a fee basis, preferring low cost options.
- *Lack of motivation to volunteering among teachers, also due to the economic crisis in the country.* Because of the excessive employment on their main job university teachers are not ready to work in the centre on a free basis, unless it gives the opportunity to earn an additional income, which is particularly urgent within the background of general economic crisis and declining living standards in Togliatti. In such circumstances people are looking for additional income opportunities, including teachers, because they also have families and a number of financial obligations requiring execution. Therefore, in tightened financial circumstances, people will definitely choose the job that in addition to moral satisfaction will be able to obtain an additional source of income and thereby increase their well-being.
- *Low level of students' responsibility for the discipline of attending classes.* Experience showed that, despite a positive attitude and the joy of attending

class, students can easily neglect them, without notifying the CTAE's staff and teachers about missing the class. This phenomenon seems especially negative in the case of a small group that can lead to a situation where the teacher comes for the lesson and the audience no.

– *Ignoring e-mails and the need for repeated messages.* Despite the preliminary agreement with the audience about the provision of information regarding the work of CTAE and the studies conducted by e-mail, experience has shown that outside the classroom on the basis of computer literacy, seniors do not check their e-mail and, consequently, miss important information about the classes timing, changes in schedule, new course proposals, etc. In addition, experience showed that students subconsciously expect to be reminded or re-confirmed the already achieved agreements about lessons. This encourages the CTAE's staff to call students more often than is required by the need. That leads to an excessive work time of its employees without a corresponding increase in remuneration, i.e., to economic irrationality of these actions.

However, despite a number of problems, the first-year operation of the Centre for Third-Age Education in VRSUS can be considered as quite successful because according to the students' opinion that was also voiced to European experts when they visited CTAE classes as part of the financial documents' examination under the grant, and at the end of the academic year, they look forward to the beginning of the new academic year in CTAE and new, interesting courses.

Peculiarities of Management of Labour Potential in Third Age Individuals

*Galina Pavlovna Gagarinskaia, Irina Garriyevna Kuznetcova,
Diana Spulber*

23.1

Introduction

Labour potential of both an individual employee and any set of workers being used in production is a very dynamic value, constantly changing not only quantitatively but also qualitatively under the influence of a complex of socio-economic, scientific-technical, psycho-physiological and many other factors. That is why the assessment of the level and extent of the use of human labour potential is now considered one of the most complex and insufficiently developed production problems. In this article the authors examine labour potential as a major resource of an enterprise because it is only due to human intelligence that new, competitive products can be created. Analysis and monitoring of personnel management problems of third-age personnel in different areas of work makes it possible to draw conclusions about the need to develop a methodology to assess how efficiently the labour potential of third-age workers is used.

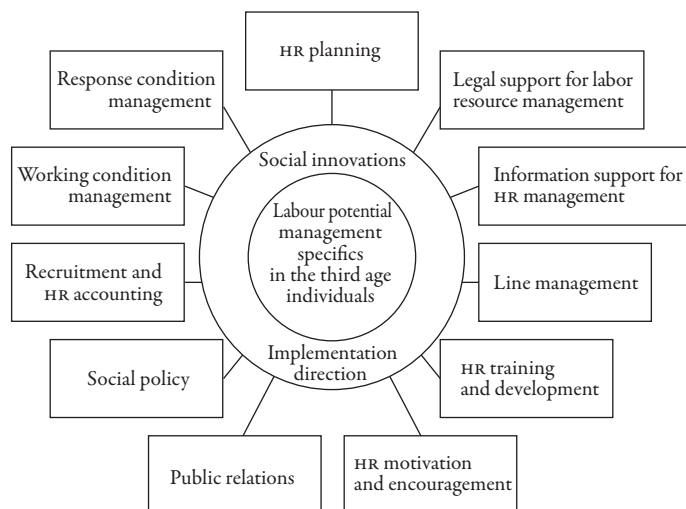
23.2

Methodological Approach to the Problem of Management of the Labour Potential of Third-Age Individuals

Human resource management of the national economy is closely linked to the introduction of innovations in the social and labour spheres. Conceptually, it has three aspects to it: formation, development, and use of labour resources, where their formation is stipulated, above all, by human potential, and the use – by social capital of the organisation and society. In accordance with this, innovations targeting human resources may have as their object directly both human capital and social capital, or human potential.

FIGURE 23.1

Main directions of implementation of social and labour innovations depending on the characteristics of the third age



Source: Gagarinskaia (2016).

A key role in HR management is played by the social mechanisms such as a system of social relations (structures, specific forms and methods of activity, as well as institutions), providing solutions to social and labour problems (groups of problems). When improving these mechanisms, the state, commercial and non-profit organisations pose as the subjects of innovation activity. The study proposed to break social and labour innovations into those directed at the human resources of the organisation (human resources of a company), at the social relations of workers in the external environment, and at the external environment. It is proposed to subdivide innovative approaches to the management of labour into the following areas of implementation: planning, recruitment and accounting, legal and information support, line management, motivation and incentives, training and development, recreation, working conditions, social policy and public relations, thus allowing us to take into account the specifics of the implementation tools inherent to them.

Solving HR management problems through social and labour innovation should be to the point, otherwise social changes are not of an innovative sort. The purpose of social and labour innovations is defined by urgent problems existing in HR management with the main trends of their development in view.

The specifics in the human resource management of different categories of workers can be considered in two areas of comparative analysis representing independent fields of study:

1. The age and gender structure of the labour resources.
2. The skill-professional qualification structure of the labour resources.

23.3

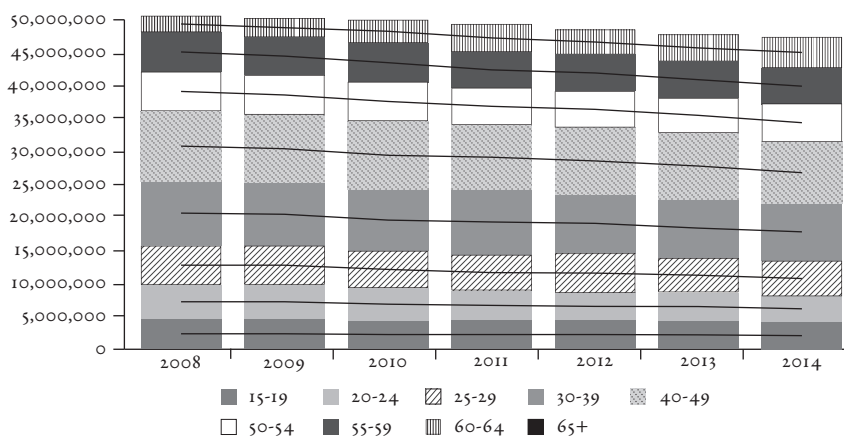
Analysis of Skill-Professional Structure of HR in Russia

The analysis shows that the skill structure of the Russian workforce has undergone changes in recent years due to transition to a new layered system of vocational education. In turn, the gender and age structure of the labour force is characterised in sufficient detail by available primary statistics that are used to forecast employment. However, the traditional approach to the analysis of gender and age structure (for aggregated age groups) does not disclose the details of the use of labour resources in full, distorting the age peculiarities of their management. This is due to the fact that workers of working age are considered as a single age category (16-54/59 years), or as broken into groups (18-24, 25-29, 30-39, 40-59 years). Such an approach could be considered reasonable if by reaching a certain age people abruptly lost all the properties of accumulated human capital or ceased to use it. In practice, on the contrary, disability (both by medical and skill parameters) occurs gradually. Some workers lose their real productivity long before retirement age, while others remain in the labour market after retirement.

In men, this trend begins from age 40 and is clearly manifested in the 50-54 age group, i.e. 10 years before the intended retirement. The trend cannot be linked to early retirement as the number of citizens eligible for early appointment of work pension is not so great. Despite the presence of the downturn in the employment rate, the older age group of employees is becoming increasingly important to the national economy due to population ageing. This process has two manifestations (FIG. 23.4):

- The ratio of working age population to the pensioners changes in the direction of increasing demographic burden.

FIGURE 23.2
Working age to retired population ratio



Source: calculated and compiled by the authors using data from Rosstat.

— There is a trend towards increased numbers of older workers (over 50 years) among the population of working age.

For a more precise delineation of the aggregated age groups, both traditionally recognised and offered by us, they are visually compared in FIG. 23.2.

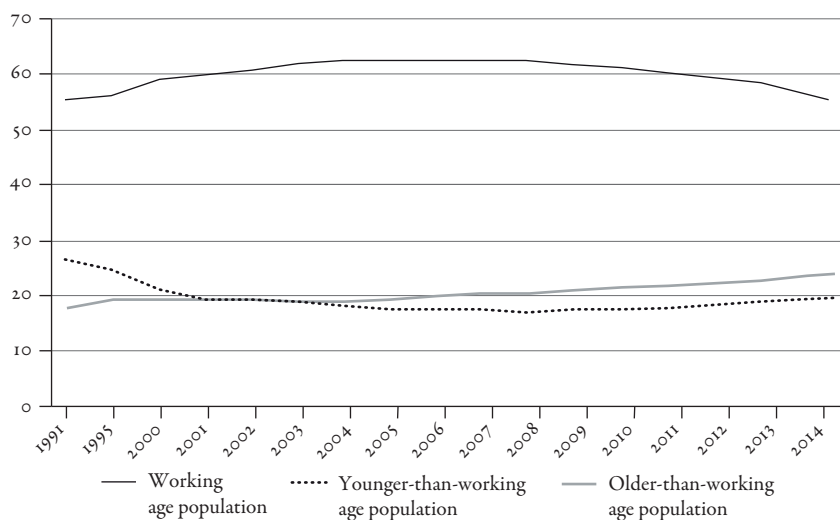
Let's consider the dynamics of the age groups in the Samara region. FIG. 23.3 shows that the share of the age group younger than working age decreased in the total population from 26.5% in 1991 to 17.2% in 2008; later years saw a slight increase of this group and in 2014 it was 19.5%. As for the working age population in the total population of the Samara region, we can see the growth of the share of this group in the period 1991-2006 from 55.6% to 62.8%; since 2007, there has been a steady decline and in 2014 its share dropped to 55.9%.

On the one hand, young people at this age have not yet reached the peak of their work activity, many continue their education and are not yet active in the labour market. On the other hand, at this age they are most able to make innovations and are most mobile both socially and geographically.

According to the forecast, the 15-72 age group of the population of the Samara region will decrease continuously until 2020. The region will have lost 78,300 people or 5.2%, arriving at 94.8% compared to 2014. In the meantime, the share of persons of more active age (20-29 years) will

FIGURE 23.3

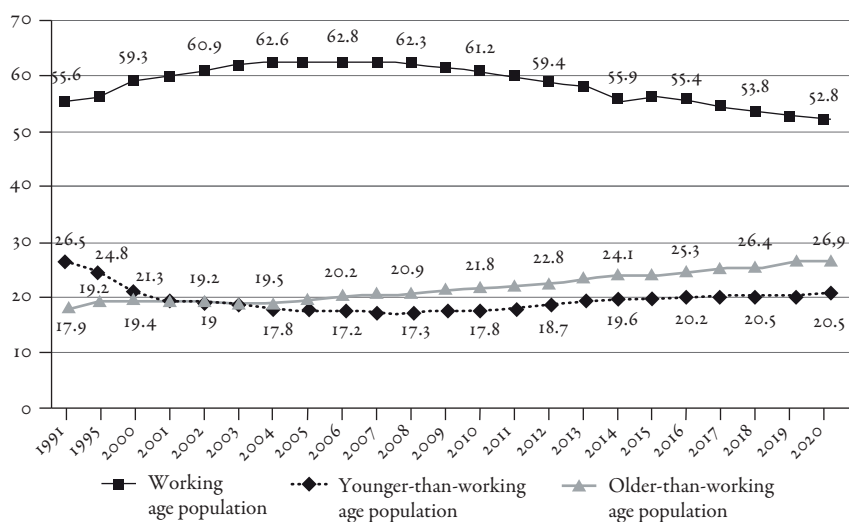
Dynamics of the age groups in total population for 1991-2014 in %



Source: compiled by the authors.

FIGURE 23.4

Predictive assessment of future changes in proportion of population of different age groups in %



Source: calculated and compiled by the authors using data from Rosstat.

steadily decline and by 2020 will have reached a level of 189,200, which is 110,500 or 36.9% less than in 2014. The number of persons aged 30-49 by will be on the rise and by 2018 will have increased by 0.8% compared to 2014. The following years will see a significant reduction of the group and by 2020 it will shrink to almost the 2014 level, which will lead to a reduction of more experienced labour potential, and which may adversely affect the economic development of the region. The 50-59 age group will also decrease throughout the forecast period analysed. Since each age group has a different economic activity and a different level of employment, it is necessary to take into account changes in the age structure of the economically active population (TAB. 23.1) for the assessment of labour potential.

During the period from 2014 to 2020 the population structure will be mainly dominated by the 50-72 age group. By 2020, its share will be 39.9%, which is 4.1 percentage points more than in 2014. This could affect the quality characteristics of the labour potential, reduce the overall level of economic activity and employment. The category aged 15-29 will also continuously decrease and by 2020 will be 20.7%, which is 6.2% less than the values of 2014. The share of those aged 30-49 will increase before 2020 (increase of 2.1 percentage points to 39.4%). Changes in the age structure of the economically active population should be considered when assessing the labour potential.

TABLE 23.1
Predictive structure of the population aged 15-72 for the period up to 2020

Year / Age, years	2014 (actual)	2015	2016	2017	2018	2019	2020	Deviation, +/- to 2014
15-19	6.9	6.6	6.6	6.8	7.0	7.2	7.4	+0.5
20-29	20.0	18.1	17.0	15.8	14.8	14.0	13.3	-6.7
30-39	19.8	20.5	20.7	20.9	21.0	21.0	20.9	+ 1.1
40-49	17.5	17.5	17.6	17.7	17.9	18.2	18.5	+ 1.0
50-59	21.2	20.9	20.5	19.9	19.2	18.6	18.1	-3.1
60-72	14.6	16.4	17.6	18.9	20.1	21.0	21.8	+ 7.2
Total 15-72	100	100	100	100	100	100	100	-

Source: calculated by the authors using the data from Rosstat.

23.4

Use and Development Factors for Elderly HR

Improvement of HR management mechanism brings about the need to assess the results of social and labour innovations in the field. In this regard, it is necessary to clarify the methods of evaluation of innovative HR management mechanisms. This problem should be solved taking into account the research priorities – third-age HR management mechanism.

The main objectives in solving this problem are:

1. Classification of HR management factors that can be influenced by social and labour innovations.
2. Analysis of indicator systems to assess the efficiency of social and labour innovations in HR management.
3. Clarifying the typology of indicators to measure the results of social and labour innovations in HR management.
4. Setting up the criteria to assess the results of social and labour innovations in HR management.

Defining the structure of HR management factors (the first of the problems studied) is a complex theoretical task. This is due to the fact that the set of related statistics, investigated in the preceding paragraph, call for systematisation and classification.

HR management can be done in age-gender and skill-qualification aspects. In this study, we will consider its factors against age features. Based on the reviewed features, four main groups of factors can be distinguished: development, quality, quantity and use of HR. The number of workforce depends on the demographic situation, laws and trends. Within these the aspects of fertility and health status (morbidity, mortality) are distinguished. This group of factors is linked to the health market. Quality of the workforce characterises the possession by employees of the competence needed for work activities. The main aspects of the problem are the quality of general education, qualification of workers, and loss of competence for various reasons.

As was shown above, the subjects whose activity influences the HR management are the state, the organisation and the employees themselves. In the process, the impact of the subjects can be both long-term and short-term, thereby causing relatively stable and dynamic factors of influence. The second base is distinguished by the two-level classification: by the subject and impact stability. Correlating these levels produces six groups:

FIGURE 23.5
The Matrix of HR of older age workforce

Classification of HR management factors	Internal (personal)				Microenvironment				Macroenvironment				Forecasting
	Subjective (dynamic factors)	Objective (steady factors)	Enterprise (dynamic factors)	Market (steady factors)	Business climate (dynamic factors)	Infrastructure (steady factors)	Education market condition	Condition of training infrastructure	STP and obsolescence of workers' competences	Quality of basic and vocational education	Condition of healthcare and recreation structure	Condition of employment infrastructure	
Human capital development factors	Self motivation	Age-related specifics of ability to learn	Training of personnel by employer	Employers' interaction with educational institutions	Education market condition	Condition of training infrastructure	Education market condition	Condition of training infrastructure	STP and obsolescence of workers' competences	Quality of basic and vocational education	Condition of healthcare and recreation structure	Condition of employment infrastructure	Education market
Human capital quality factors	Professionalism	Age-related physiological characteristics	Personnel placement	Loss of qualification by unemployed	STP and obsolescence of workers' competences	Quality of basic and vocational education	STP and obsolescence of workers' competences	Quality of basic and vocational education	Demographic situation	Condition of healthcare and recreation structure	Condition of employment infrastructure	Condition of employment infrastructure	Human capital quality
Human capital quantity factors	Disability degree	Age-related morbidity	Working conditions and occupational injury rate	Workforce migration	Demographic situation	Condition of healthcare and recreation structure	Demographic situation	Condition of healthcare and recreation structure	Macroeconomic situation	Condition of employment infrastructure	Condition of employment infrastructure	Condition of employment infrastructure	Demography
Human capital use factor	Work motivation	Family structure	Recruitment motivation	Spatial and qualification structure of work places	Macroeconomic situation	Condition of employment infrastructure	Macroeconomic situation	Condition of employment infrastructure	Macroeconomic situation	Condition of employment infrastructure	Condition of employment infrastructure	Condition of employment infrastructure	Employment

1. Subjective internal factors (depending on the employee's decision).
2. Objective internal factors (characterise an employee, but hardly susceptible to his/her control; reflect objectively the existing age and other regularities).
3. Microenvironment of the enterprise (depends of the decisions taken at company level).
4. Market microenvironment (reflects objective regularities in the market's behaviour).
5. Macro-economic situation (balance of market forces exposed to the state's socio-economic policies).
6. Macro-environment infrastructure (social institutions and organisation of markets, a change of which would require long-term reforms).

Balance of the markets, entities, and sustainable impact on the workforce of older ages allows us to create a matrix of 24 elements.

23.5

Classification of Social-Labour Innovation Indicators in HR Management Mechanisms

Quality workforce indicators are associated primarily with features of the professional and qualification structure. This structure is affected by many factors, some of which are also shown in age context. For example, an employee's professionalism is associated with his/her experience, increasing with age. The loss of unused competencies under unemployment and due to placement of personnel also accumulates over time. In turn, macro factors influence the characteristics of different generations of workers. For example, a change in general education standards causes a change in the general competencies of school graduates. All these factors must be taken into account when predicting changes in the quality of human resources. This group of factors is not related to the current state of any market, except the general education system, which in some cases (in certain segments or countries) can be regarded from the market point of view.

Workforce development as an independent vector is mostly related to the peculiarities of the human potential of the organisation, region and country. It is defined by a system of vocational education and its relationship with the state and regional policy, and direct activities of the companies. The education market is distinctive in that it is irregular in relation to the workers' age. So, at the age of about 25 many workers continue vocational

FIGURE 23.6
The indicators of social and labour innovations

Indicators for results of social and labor innovations		
Classification base		
Representation form	Measurement object	Decision making subject
Qualitative	Financial	Budget results
	Revenues	
	Expenses	
Quantitative	Socio-economic results	Commercial
Cost related	HR attributes	
Natural	Prevalence of innovation mechanism	Social results
	Innovation activity	

education or combine it with regular education, while at the age of over 50 only the vast minority of workers undergoes vocational training, retraining or skill improvement. However, the results of HR development are affected by intrapersonal factors such as employee's motivation for the development of age-related psycho-physiological and learning opportunities.

The last aspect of HR management investigated is their use manifested in employment (self-employment). Although occasional studies on the impact of domestic work on the welfare of society emerge under the aegis of the new institutional economic theory, the dominant approach to human resources is still concentrated on the issues of employment and, to a lesser extent, is associated with entrepreneurial activity. Job finding and employment are influenced by such factors as motivation of employment by employers and space-qualification structure of work places, economic cycles, sophistication of employment services and other labour market institutions. It is impossible to ignore the subjective factors: the desire (reluctance) on the part of a person to continue his/her career, his/her family structure, that creates additional obligations on domestic work. The importance of these factors varies depending on the gender and age of the worker. The specifics of human resource use factors are that they are direct-

ly reflected in the labour market and allow traditional indicators, such as employment and productivity, to be used for their analysis.

23.6 Conclusion

Summarising the study, it must be emphasised that the evaluation of the results of innovative social mechanisms is a complex methodological problem. Its solution is possible only in the context of particularities of labour potential management of various categories of workers depending on the objectives of innovation and overall policy of the national economy's labour potential management. In the Russian context, heterogeneity of the demographic situation and incomplete reproduction of generations predetermine the study of the condition of third-age labour potential, which is less used and developed, to be the most relevant path of research. It is exactly this unfortunate situation that contains unrealised potential for improving HR management through social and labour innovations.

The factor analysis performed allows us to consider labour potential management as a complex field of activity, investigated in aspect of gender and age at the employee level, organisation, and state in the aspects of use, development, as well as the quantity and quality of labour potential. With all that, the impact of the subjects can be both long-term and short-term, thereby causing relatively dynamic and relatively stable factors of influence.

When creating a system of indicators, this complexity of the innovative mechanisms can be taken into account by including the target compliance principles, factor interdependence, completeness and integration of the indicator system in the methodical approach to assessment of innovations. The elements used within such indicators can be classified based on presentation form, object of measurement, and decision-making subject. The main stages of creating an indicator system should include defining of the objective of change in the social mechanism, identifying necessary attributes of human resources, substantiating the target indicators of socio-economic results, defining the financial indicators comparable to those reflecting the socio-economic results, generating the integrated indicators for social and labour innovation results and defining criteria to assess the results.

Closing Remarks

Guido Amoretti, Diana Spulber, Nicoletta Varani

A first reflection on the papers presented bring us to emphasise how all should be traced in different measure, also those referring to a specific case-study, in a broad context such as that of the ageing of the planet's population, a deep theme that need studies and new areas of investigation.

Particularly, new areas of research are oriented to management of ageing through policies and best practices of active ageing, which for a long time have taken on a particular relevance, as the papers' originality and results show.

Population ageing is an achievement, but because of the tendency to the increase of the phenomenon in all countries of the planet it is also a concern and a challenge for states and society.

Indeed, as evidenced by the contributions referred to in the section *Value of Ageing and the Challenge of the Third Age*, in which a general picture is provided of the relationships between ageing and health, emphasising some aspects of social character, on the model of active ageing and health promoted in 2012 by the World Health Organisation and the European Union, you can find a whole series of implications which need a brief summary.

The first section examines the ageing phenomenon as a whole. It starts from the analysis of the elderly concept in time and around the world from an anthropological point of view, mentioning also mythology of ageing and reviewing the concept of ageing in different cultures.

The elderly condition in less developed countries has been also stressed where ageing people numerically are less relevant as in Africa. The elderly condition in Africa was dealt with by verifying whether a correspondence exists between a tribe's wise man concept, that can be assimilated to old people's role in pre-industrial societies, and how modern African societies take ageing into account.

Definitions of elders in a historical key have been brought again, in fact the "elders" have been split into "young elderly", "late adults" and "grand

old age". The importance of self-realisation through the labour market, workplace and re-orienting courses were focused on.

The problems that we are going to face because of demographic evolution was analysed with special focus in the EU and the EU social policy as a reply to this urgent question. The evolution of UTE was considered as an impulse to Lifelong Learning and demographic evolution as an impulse to welfare systems. The improvement of how the social policy around EU countries and changing of welfare systems has had a real effect on the social integration of ageing people and consequently on active ageing was shown.

After the analysis of demographic and cultural evolution of elderly as a concept and as a phenomenon the section also includes measures provided by the European Commission through several kinds of calls and financing projects, an evaluation of some projects and calls is made. Social work is analysed in keys of improvement of well-being of elderly people, and as a multidimensional construct, in particular what should be considered when working with elders.

Quality of Life and Lifelong Learning are the common denominators of the articles in Section two. Quality of life is examined both from an objective point of view as a subjective perception: both contribute to promote the maintenance of self-sufficiency, with the easily imaginable positive impact on national economies and on the related social and health care systems. The centrality of learning in the life of each of us is a fact: lifelong learning is no longer limited to the working period but extends itself throughout the entire life-span, constituting an essential component of active ageing. The positive contribution of lifelong learning to psychological well-being, cognitive functioning and self-sufficiency has been demonstrated by several studies: it is difficult to talk about active ageing in the absence of lifelong learning activities.

Besides the second section focused attention on the well-being of elders around the world, their employability and the role of sport and education on active ageing. As we saw from this section, economic status is an important factor for ageing and inequality in this field is a social disadvantage with which we should deal. Poverty represents a cause of reduction of life expectancy. The picture of poverty and health conditions of old people in Sub-Saharan African countries throws light on how the "old people" concept has passed from "inexhaustible sources of wisdom" to "more mouths to feed". This fact happened because of loss of family ties as a micro-system and if we check at the macro-system level, this also happened because of changes relating to globalisation processes, armed conflicts, structural ad-

justments, urbanisation, natural disasters such as droughts and floods, the HIV/AIDS pandemic. Unlike Sub-Saharan African countries, in Brazil life expectancy is increasing in a giddy way and the Brazilian government is trying to solve the problem of social inequalities through girls' schooling, that might also be a solution or some know-how for African countries. The analysis of the status of elderly in the EU was done examining Genoa, the EU city with the oldest people with a particular focus on the elderly's frailty. The association of different vulnerability conditions and possible social factors such as occupational status, education, cultural fruition, social activation was brought to light. The decline in frailty resulted more evident in socially disadvantaged conditions.

Northern countries were analysed from the point of view of ageing-friendly universities (AFU) citing the case of Dublin City and Strathclyde City: it was shown how higher education institutions need not only to consider alternatives to many geared systems towards full-time students but must also look outside many conventional benchmarks which fail to capture the rich and diverse activities encompassed within the vision of the AFU.

From East European countries Ukraine, Russian Federation and Azerbaijan were taken into consideration. Employability factor and a more "friendly economy" were seen as an impulse for active ageing even through training and retraining for retired people. An analysis of the Ukrainian situation has shown that small steps have been made in this direction citing the platform work.ua and how the Ukrainian policy should take into consideration the economic recovery, re-launching the economy in an ageing society. Other analyses have been made on veteran athletes and their physiological ageing: this research has shown how the algorithm that joins sex and age should be used in order to preview how the performances and the role of adaptive mechanisms on sport results have been enhanced.

The role of education in later life has been analysed as a political reply of Azerbaijan to increase the social integration of ageing people. Even for Azerbaijan, education in later life is a new trend and serious attention should be paid to adult education. To provide this condition, a relevant legislative basis should be created in Azerbaijan and people who work in this field should be encouraged.

Finally, the section concludes with an international and historical analysis of the development of Universities of the Third Age (UTA or U3A) and stressed the difficulties that the U3A movement is currently experiencing, and the possible and actual biases that centres may incur.

Some suggestions have been provided for the future role of U3As, ranging from embracing a broader vision of learning, improving the quality of learning, instruction, and curricula, as well as a wider participation in the agenda that attracts elders experiencing physical and cognitive challenges.

The articles that make up the third section of the volume (*Third Age and Activity Hypothesis and Experiences*) have highlighted a series of case studies and concrete experiences in which the adjective “active” is considered the interdependence between changes in old people’s lives and changes in social structures. So, social determinants acquire a fundamental role in the ageing process of people. Emphasis shifts from the concept of “productivity” (typical of working age) to that of “commitment in life” (as participation in social life), to which is attributed the ability to help preserve the cognitive function and social relationships.

The peculiarity of this section was that although in the others we can see a more theoretical and empirical approach, this one is made up of different case studies.

The section has underlined the EU experience in organisation of the University of Third-Age Education, as in Slovakia and in Italy, and how it was implemented/used in eastern European countries like Ukraine and Russian Federation. From the Italian side an analysis of the role of Lifelong Learning on active ageing was provided and how Italian policy responds to this social need citing the law regarding public and private organisations that deal with seniors. The case of the UTE of Genoa University underlined the importance of intergeneration communication and provided a synthetic description of learners, of the courses and of the organisation of the academic year. The experience of Slovakia highlights how the organisation of the courses should have a personalised approach and that each activity organised within programmes for older people should contain a little bit of fun and therapeutic effect, because only such activities, that fully meet people’s needs, will be very popular and sought after.

The intention of Ukraine to join the European concept of education that provides continuous training has stressed the importance of formal and non-formal education with special focus on adult people, the importance of promotion of adult learning at the national and regional level and the importance of social integration of the elderly of Ukraine. On the integration of ageing people, the case study of Donetsk (moved to Mariupol) was cited where integration of ageing people is done through promotion of education, education courses and intergenerational collaboration.

The analysis of micro-realities like the experiences of St. Petersburg and Togliatti on organisation of Institute/Centre of Third-Age Education has underlined the role of analysis of future needs of learners and the role of designing courses with particular attention to the peculiarities of new alumni. Unlike St. Petersburg, Togliatti met more difficulties in promoting the courses and in finding volunteer teachers. This fact was explained by the economic crisis (in Russia family incomes are varied in different regions).

Finally, this section underlined the peculiarities on HR management on old workers by taking into account their bio-psychological changes and has shown how Russian Federation is in the same demographic trend as the EU and how the new indicators should be considered for the best use of the capital that old workers represent.

In summary, from the articles we can evince, directly or indirectly, how the pillars of active ageing are related to three main thematic areas: health, social participation and security. As to these areas specific initiatives have been illustrated such as: prevention and promotion (health); socio-economic activities, cultural-formative activities (social), social, physical and financial protection (security). In a world inhabited by an ageing population, this volume offers a series of reflections, moving from general to particular, that suggest the assumption of social policies intended to encourage the maintenance of a good activity level to prevent the onset of pathological states and disabling the implementation of interventions in health and social able to contain the loss of self-sufficiency. The articles collected in this volume provide guidance on the forms of intervention which are most appropriate for active ageing: educational programmes, Lifelong Learning and cognitive enhancement programmes on the one hand, policies of social intervention and health on the other. Verification of the actual effectiveness of these measures offers incentives to researchers who deal with the planet's elders, whose task is to propose, plan and manage, in concert with the legislative, medical and social systems, actions promoting an active lifestyle, to influence the preservation of self-sufficiency in the elderly and reduce, consequently, the periods of non-reliance and the economic and social costs associated with it. The hope is that reading this volume increases the sensitivity of political decision-makers towards a policy of prevention for the ageing with the understanding that the resources invested in this sector can represent a savings in the future, as well as improve the quality of life of millions of people.

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Section III

Third Age and Activity: Hypothesis and Experiences

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