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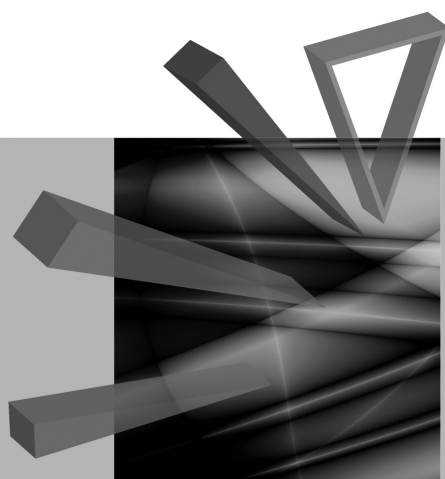
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# **Regional Economy in Theory and Practice**



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## **EDUCATIONAL ENGAGEMENT OF THE ELDERLY\* – THE EXPERIENCES OF SELECTED BALTIC SEA REGION COUNTRIES\*\***

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**Summary:** The aim of this article is to present the engagement of adults close to retirement age in the Baltic Sea Region countries in the education of adults, as well as to discuss the possibilities and conditions for the educational activity of the elderly. The authors also refer to the relationship between the participation of the elderly in education and their socio-economic situation.

**Keywords:** ageing society, adult education, the essence of elderly education.

### **1. Introduction**

The ageing of society is currently a phenomenon which touches all the European countries. According to the European Commission's forecasts [*The 2009 Ageing Report...* 2009, p. 11], the median of the European Union age in 2060 will be 47.9 years, which means that it will be 7.5 years higher than the median from 2008. Moreover, the number of the elderly over 65 years old will almost double in the 2008–2060 period (it will increase from 85 to 151 million). The number of people over 80 years old will triple, increasing from 22 million in 2008 to 61 million in 2060.

For the European economy, the prospect of the member countries' inhabitants getting older means, among others, a threat to the stability of public finance [*The 2009 Ageing Report...* 2009], increasing difficulties with access to qualified labour resources [Znajmiecka-Sikora, Kędzińska, Roszko (eds.) 2011] and the development of new markets [Stround 2005]. On the Pan-European and member country level,

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\* "The elderly" are defined herein as the people over 65 years old, i.e. in the non-mobile productive and beyond-retirement age.

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some programmes and activities are being implemented to ease the forecasted unfavourable consequences of the ageing of European society. Their purpose is, among others, to increase the vocational activity among the elderly, mainly those close to the retirement age, as well as to promote social inclusion.

Education constitutes one of the key areas of influence on the vocational and social activity of the elderly. The authors of the *Learning: The Treasure Within* report, claim that education leads to global activity on the basis of the democratic participation in the information technology and learning society. It is also claimed that it plays a crucial role in human development and the maintenance of fluency and usefulness of people in the context of life and work [*Learning...* 1996, pp. 100–101]. According to Matlakiewicz, “the lack of intellectual challenges and stimulating oneself to find them, based only on routine everyday private and professional life tasks, leads to lowering the intellectual competence of individuals” [Matlakiewicz, Solarczyk-Szwec 2005], which is equivalent to the slow withdrawal from professional life and social exclusion.

The aim of this article is to present the engagement of the elderly close to retirement age in the Baltic Sea Region (BSR) countries in the education of adults, as well as to discuss the possibilities and conditions for the educational activity of the elderly. The authors also refer to the relationship between the participation of the elderly in education and their socio-economic situation.

## 2. The essence of the education of the elderly

The education of the elderly is a part of the general concept of adult education. According to the Recommendations of the 19th General Conference of UNESCO in Nairobi (1976), it encompasses the system of educational activities in varied forms and scopes, aimed at the development of abilities, enrichment of knowledge, improvement of qualifications or the change of attitudes and behaviours, enabling the rightful participation in the sustainable social and economic development [Recommendation on the development... 1976].

First of all, adult education has its proper (extending one’s knowledge) and compensatory (supplementing education by those who did not obtain it when they were of adequate age) functions [Milerski, Śliwerski (eds.) 2000, p. 142]. As far as the elderly are concerned, there are also other important functions, such as [Jankowski, Przyszczykowski, Skrzypczak 1996, p. 28]:

- preventive function – secures against job loss, as well as the mental and moral stagnation, as well as counteracts the knowledge inflation and qualification ageing process;
- personalization function – provides the basis for the solution of problems related to one’s own identity;
- pragmatic function – support related to practical approach to making use of the world shaped by modern science and technology;





- cultural function – providing the individual with broad access to the active participation in culture;
- social function – helping the individual to participate actively and creatively in the socio-economic life, as well as to play a constructive role in it.

Education constitutes an exceptionally important aspect of the *active ageing* concept [Kalachea, Kickbusch 1997, pp. 4–5; *Active Ageing...* 2002]. It is essential for maintaining physical ability and the possibility of performing professional work by the elderly, as well as for their active participation in social, economic, cultural and civil life [Zych 1999; Czerniawska 2003, pp. 15–22]. As the research results show, the elderly who were graduates of universities or high schools are healthier and more physically and intellectually capable in comparison to their inactive peers [Kozieł, Trafiałek 2007, pp. 104–105].

Learning constitutes for the elderly a way to fulfil their specific needs. Synak [1992, pp. 3–8] highlights the need of affiliation, usefulness, recognition and life satisfaction. Migala [2012], on the other hand, refers to social and cultural needs, as well as to the need for attaining a high quality of life. Moreover, the participation of the elderly in various forms of education promotes the establishment of interpersonal bonds, prevents social isolation and shapes the positive image of old age and the elderly themselves, thus acting against marginalisation [Rejman 2010, p. 83].

The educational activities aimed at adults due to their biological and personality traits, as well as their experience, should be implemented differently in comparison to the activities addressed to the youth. The difference in learning between the young and the elderly relates mainly to the fact that the elderly display inferior information processing skills and superior (professional) expertise [Matlakiewicz, Solarczyk-Szwec 2009].

In particular, late adulthood<sup>1</sup> is a time for integration and harmony of the logical-rational and the intuitive-emotional spheres [Harwas-Napierała, Tempała (eds.) 2001, pp. 263ff]. The crystallised (social) intelligence related to life experience remains constant or increases, whereas the fluid (biologically determined) intelligence is responsible for the processing information and acquiring new skills.

Ensuring the possibly high effectiveness of learning of the elderly requires the proper organisation of the whole process, including:

- selection of content and methodology depending on the needs and expectations of the participants,
- adjusting the pace of work (knowledge transfer, practising practical skills etc.) to individual conditions of the student,
- using personal and professional (pre-training) experience,
- ensuring a good atmosphere in the group,
- using interactive methods, including taking into consideration the individual knowledge system and professional experience.

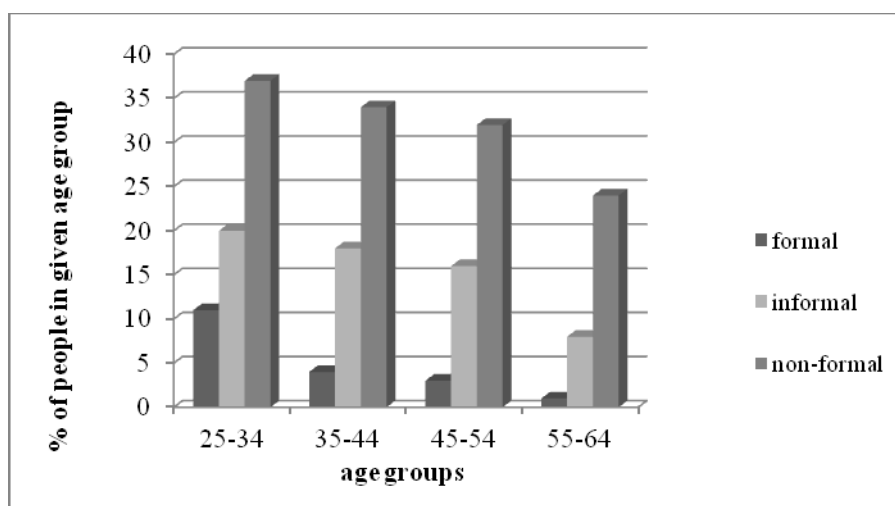
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<sup>1</sup> Adulthood stages: early adulthood: 20 to 30–40 years; medium adulthood: 30–40 to 50–60 years; late adulthood: over 55–60 years. The division can be found in [Turner, Helms 1999, pp. 545ff].



### 3. The politics and activities of BSR countries aimed at adult education

In the European Union, the significance of the *life-long learning* idea is paid special attention to.<sup>2</sup> *The Copenhagen Declaration* [2002] places special stress on the strategies of continual education and mobility as important for the promotion of employment increase, active citizenship, fighting social marginalisation and enabling personal development. The policy of the Union related to the education and training of the adults [*Council conclusions...* 2009] aims at developing the systems of education and vocational training, which will be more attractive, supportive for the social inclusion and professional career, adequate, flexible and innovative, by the year 2020. The European Commission assumes that by the year 2010, 12.5% of working-age Europeans (25–64 years old) should take part in life-long learning [*Council conclusions...* 2003], whereas in 2020 such a proportion should amount to at least 15% [*Council conclusionson...* 2009].



**Figure 1.** The participation in varied forms of education according to age in the European Union in 2005

Source: [Ala-Mutka et al. 2008, p. 16].

Adult education is implemented in three main forms: formal education, informal education (learning through experience) and non-formal (incidental) education [*International Standard Classification...* 1997]. The elderly use mainly informal and non-formal forms of education (see Figure 1).

<sup>2</sup> OECD defines life-long learning as “personal development of every human being and the development of social features, allowing it to function in society, in all its forms and in all settings – in a formal system and within formal and incidental learning”.



In the Baltic Sea Region countries (Denmark, Estonia, Finland, Lithuania, Latvia, Germany, Poland and Sweden) varied initiatives related to the implementation of the EU adult education policy have been introduced. Some of them relate to people looking for a job or threatened with social exclusion or to immigrants. Many of them relate to improving qualifications, acquiring new skills or learning foreign languages (see Table 1). They can be implemented mainly within the framework of the Lifelong Learning Programme. Initiatives addressed to adults can be found here, e.g. Leonardo da Vinci for vocational training or Grundvig for adult education.<sup>3</sup>

A distinctive group of educational activities is formed by those addressed to the elderly. Most often they are performed as informal and non-formal education. Not all of them are shown in the statistical data related to the participation in continuous learning.

In Sweden the education of the elderly is conducted in folk high schools, study associations and student organisations in folk high schools. These include enhancing people's ability to influence their own lives and fostering a commitment to the development of society.<sup>4</sup>

In Denmark a wide range of different schools operates within the framework of liberal non-formal adult education. The courses do not lead to recognized formal qualifications, the aim being personal development. The most well-known type of non-formal adult (including elderly) education are the folk high schools. Courses last between 1 and 36 weeks, and are attended by people aged from 18 to 70–80. Evening Schools, Day Folk High Schools and University Extension Courses offer other possibilities for non-formal adult education in Denmark.<sup>5</sup>

In Germany the process of adult education is implemented by numerous institutions and organisations, for example in: Volkshochschulen (adult education centres), church organizations (Catholic and Protestant), ARBEIT und LEBEN Educational Association, community adult education centers (Heimvolkshochschulen), National and Federal Agency for Civic Education etc. Most courses offered to the elderly are held in the extramural or evening mode. Correspondence e-learning courses are also available. In general, there are three types of educational institutions for the elderly, folk universities, training centres and academies for seniors organized at almost every university, known in Poland as “the universities of the third age”.

The main form of elderly education are the universities of the third age. Ziębińska [2007] lists the following characteristics of the Polish universities of the third age:

- purpose – aimed at stimulation of the intellectual activity of the participants,
- lack of uniformity of the organisational form and financing method,

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<sup>3</sup> [http://ec.europa.eu/education/lifelong-learning-programme/index\\_en.htm](http://ec.europa.eu/education/lifelong-learning-programme/index_en.htm) [date of access: 10.09.2012].

<sup>4</sup> <http://www.sweden.gov.se/sb/d/6997> (date of access: 12.09.2012).

<sup>5</sup> <http://en.iu.dk/education-in-denmark/detailed-information/adult-and-continuing-education> (date of access: 12.09.2012).



**Table 1.** Policies and activities aimed at adult education – examples in selected BSR countries

Country	The assumptions of the adult education policy
Denmark [Denmark... 2012]	The Ministry of Education started to work on the definition of the National Qualification Framework. In 2009, the proposal was accepted and it has been implemented in the Danish education system since 2010. Eight levels of learning have been distinguished in Denmark, including one related to the qualifications of adults participating in the continuous learning system (VET).
Germany [Hippach-Schneider, Hensen, Schober 2011]	In 2004, the <i>Strategy for Lifelong Learning in the Federal Republic of Germany</i> was adopted – it underlined the role of informal and non-formal education forms in Germany. The purpose of the <i>Potential Areas of Flexibility in Initial and Continuing Training</i> programme is increasing the flexibility of the adult education for the needs of the labour market. The programme is financed by the Federal Ministry of Education and Research (BMBF) and implemented by the Federal Institute for Vocational Education and Training (BIBB). The e-learning continuing training database ELDOC, operated by the Federal Institute for Vocational Education and Training (BIBB) in Germany, lends support to those planning their continuing training and interested in finding suitable e-learning or blended learning provision. The main focuses of the ELDOC database are the areas of computers/IT, economics and law, cross-curricular qualifications, languages, technology and the natural sciences.
Poland [Strategia rozwoju edukacji... 2005; Strategia kształcenia ustawicznego... 2003]	Adult education in Poland takes place in the schools for adults and in continuous learning institutions, practical learning institutions, as well as training and vocational improvement institutions. The organization of adult education in Poland is regulated by the <i>Strategy for the Development of Education for 2007–2013</i> and the <i>Strategy for the Development of Continuous Learning</i> .
Sweden [Bostrom, Boudard, Siminou 2001]	The basic principal of Swedish education policy is that all basic education shall be provided at school. To attain a workforce which can develop further in the workplace and be flexible, a good foundation in general subjects is the most important prerequisite. The Swedish authorities see upper secondary education as a minimum and tertiary level as the ideal goal – and even a right for all Swedes. They aim at laying a solid foundation for learning through life, a commitment to equity and social inclusion, openness and participation. Sweden has a long tradition of social partner involvement in VET. The idea behind the government's initiative is that the greatest knowledge on the criteria and suitable measures for local and regional growth and employment is to be found among those most closely involved.

Source: own elaboration.

- syllabuses taking into account the specifics of the region and the interests of the participants,
- the promotional activity related to the activity patterns for the elderly,
- size: 50–1500 participants.



#### 4. Educational engagement of the elderly in selected BSR countries

The educational activity of adults in the Baltic Sea Region varies strongly. According to the ELLI Index Europe 2010 (see Table 2), in all the categories directly related to the participation of adults in formal and informal education, the Scandinavian countries – Denmark, Sweden and Finland – are the leaders in the ranking. The adults in the new EU member countries (Poland, Lithuania and Latvia) display definitely lower educational activity.

**Table 2.** European Lifelong Learning Indicators – 2010 results of BSR countries

Country	Participation in lifelong learning	Adult participation rates in formal education and training	Participation in job related non-formal education and training	Learning new things at work	Participation of employees in CVT courses
	Rank/27	Rank/23	Rank/22	Rank/27	Rank/25
Denmark	2	5	–	3	8
Sweden	1	2	1	2	4
Finland	3	4	2	1	6
Germany	12	14	3	20	14
Estonia	9	15	5	7	18
Latvia	16	13	15	18	22
Lithuania	21	9	14	26	22
Poland	22	12	19	17	19

Source: [ELLI... 2011].

The analysis of data available in the Eurostat database [Eurostat 2012] and related to the participation of the elderly in education and training in the 2000–2012 period, allows for concluding that, like in the general adult population, also in the 45+ age groups such initiatives have definitely more participants in the Scandinavian countries. Moreover, the educational activity is decreasing with age. Persons aged 45–54 display much larger engagement than persons aged over 55. In all the analysed BSR countries, women increase their qualifications more often than men (see Figures 2 and 3).

As the research led by Ziębińska [2007] shows, the main motives of participation in the classes offered to the elderly include the willingness to maintain intellectual ability, expanding one's knowledge and keeping in touch with people from the same age group. The barriers for the participation of adults (including the elderly) in education include the lack of time, high costs and excess professional and family duties [Kształcenie ustawiczne w Polsce... 2012].



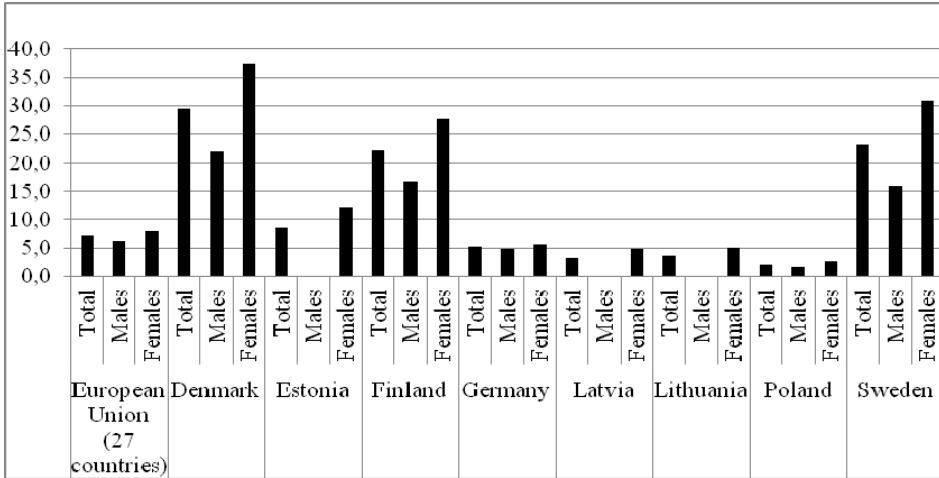


Figure 2. Participation of persons aged 45–54 in education and training in 2011 (%)

Source: own elaboration based on the EUROSTAT data.

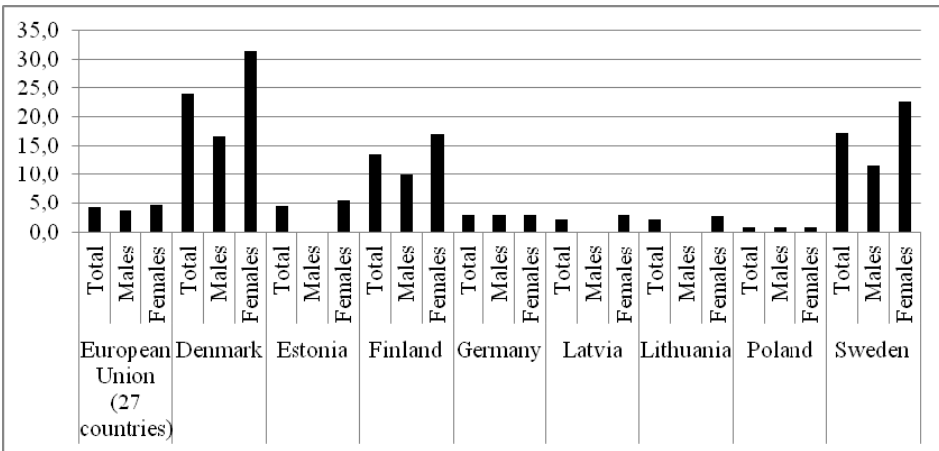


Figure 3. Participation of persons aged 55–64 in education and training in 2011 (%)

Source: own elaboration based on EUROSTAT data.

### 5. Summing-up

The example of the Baltic Sea Region countries shows a significant diversity in the level of adult participation in education. It is highest in the Scandinavian countries, whereas in the new EU members it is definitely lower. Educational activity decreases with age. This trend can be observed in all BSR countries, although

again the participation of the elderly is two (Finland, Sweden) to five (Denmark) times higher than in other countries covered by the analysis.

The distinct diversity of the level of educational activity of the elderly in the individual BSR countries depends on several factors, such as:

- the educational culture and social acceptance for the life-long learning model,
- the assumed role of knowledge and intellectual capital in the enterprise and in the broader context of the national economy,
- system of direct and indirect incentives to continue education,
- the national educational system, including the size and diversity of the institutions offering training on different levels and in different forms,
- the needs and expectations related to education displayed by the adults, including the elderly,
- the availability of the educational offer adjusted substantially and methodologically to the needs of the elderly,
- the assumed image and the social role of the elderly – the way they are perceived in society.

The basic barriers for the active participation of adults in the educational activities in Poland include the lack of education need awareness', negative social attitude towards the idea of life-long learning (especially among the poorly educated elderly), low availability of the Internet and even the insufficient cooperation between the educational institutions and the employers or social and economic partners.

The educational mobilization of the elderly has an important socio-economic significance. As suggested above, the participation in various forms of education, especially for the elderly, is connected with maintaining the professional, social and public activity, while positively influencing their psychophysiological condition.

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## **ZAANGAŻOWANIE OSÓB STARSZYCH W EDUKACJĘ – DOŚWIADCZENIA WYBRANYCH PAŃSTW REGIONU MORZA BAŁTYCKIEGO**

**Streszczenie:** Celem artykułu jest prezentacja zaangażowania osób w starszych w państwach regionu Morza Bałtyckiego w edukację dorosłych oraz omówienie możliwości i uwarunkowań aktywności edukacyjnej osób starszych. Autorki odniosły się także do zależności pomiędzy udziałem osób starszych w edukacji a ich sytuacją ekonomiczno-społeczną.

**Słowa kluczowe:** starzenie się społeczeństwa, edukacja dorosłych, istota edukacji osób starszych.

