



Education and Culture DG

Lifelong Learning Programme

Evaluation toolkit on seniors education to improve their quality of life

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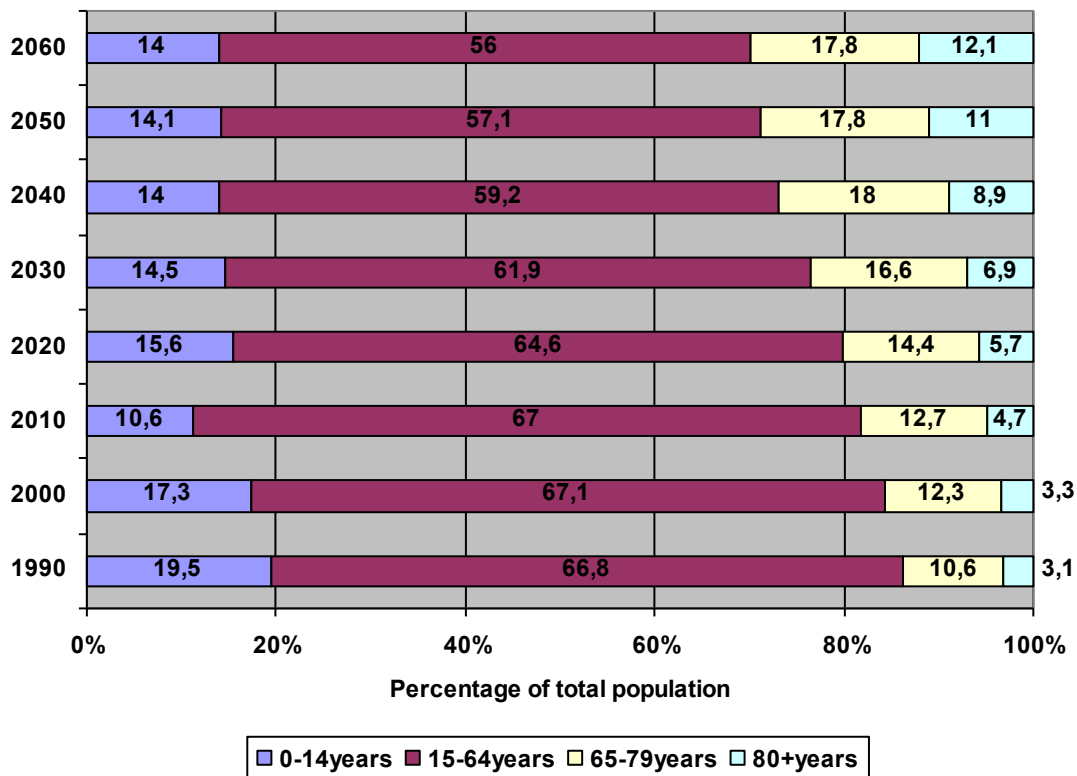
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# Executive Summary

This report presents a series of statistical portraits that address a range of social policy concerns for the European Union. The portraits may be read as separate articles but there is some overlap between subjects. Each portrait is built around some selected indicators. The portraits cover some of the Europe 2020, and the Open Method of Co-ordination indicators: Europe 2020 is a new strategy for a smart, sustainable and inclusive growth adopted by the European Council on 17 June 2010. The portraits are based mainly on data that were available in early autumn 2008.

## 1 Demography

On 1 January 2010 the population of the EU-27 stood at 501.1 million. Eurostat's 2008-based population projections (convergence scenario) show the population of the EU-27 rising gradually to 520.7 million in 2035 and thereafter gradually declining to 505.7 million in 2060. According to Eurostat population projections (EUROPOP2008, convergence scenario), the population of the EU-27 as a whole will be slightly larger in 2060, but much older than it is now. The impact of demographic ageing within the European Union is likely to be of major significance in the coming decades.



Consistently low birth rates and higher life expectancy will transform the shape of the EU-27's age pyramid; probably the most important change will be the marked transition towards a much older population and this trend is already becoming apparent in several Member States.

Another illustration of the ageing of the population is the trend in the median age. In the EU- 27 the median age of total population rose from 35.2 years in 1990 to 40.9 in 2010.

What are the main challenges posed by population ageing?

- Tackling early retirement
- Combating social exclusion of older people through active participation
- Tackling ill health in older age

## 2 Lifelong learning

The EU Labour Force Survey (LFS) provides quarterly results on participation in education and training in the four weeks preceding the survey. The 2009 LFS results showed that 9.3 % of persons aged 25–64 participated in education and training activities in the EU. The participation rate was generally higher among women (10.2 % against 8.5 % for men).

Lifelong learning, 2009 (Percentage of the population aged 25-64 participating in education and training over the four weeks prior to the survey):

|         | EU-27 |
|---------|-------|
| Total   | 9.3   |
| Females | 10.2  |
| Males   | 8.5   |

Survey indicated several reasons for participation in non-formal education and training: by far the most important reasons were ‘to do a better job’ and ‘improve career prospects’. This was the main response in almost all the countries and the weighted average in 19 EU countries was 64 %. The second most important reason for participation in non-formal education and training was ‘to increase my knowledge/skills on a subject that interests me’. One third of the respondents selected ‘acquiring knowledge or skills for everyday life’ as a reason for participating in education and training. About 22 % of the respondents were obliged to attend education or training, 16 % participated to obtain certificates and 15 % participated to meet new people or just for fun. Starting one’s own business was not a popular reason for participation — only 4 % of respondents mentioned this source of motivation.

Reasons for participation in non-formal education and training, 2007 (%):

| To do job better and improve carrier | To be less likely to lose | To increase possibilities of getting a job or | To start own business | To be obliged to participate | To get knowledge/skills useful in everyday life | To increase knowledge/skills on an interesting | To obtain certificate | To meet new people or just | Other |
|--------------------------------------|---------------------------|---|-----------------------|------------------------------|---|--|-----------------------|----------------------------|-------|
|                                      |                           |   |                       |                              |   |  |                       |                            |       |

|       |           |      |                           |     |      |      |         |      |         |     |
|-------|-----------|------|---------------------------|-----|------|------|---------|------|---------|-----|
|       | prospects | job  | changing a job/profession |     |      |      | subject |      | for fun |     |
| Eu-27 | 64.0      | 13.0 | 17.0                      | 4.0 | 22.0 | 30.0 | 51.0    | 16.0 | 15.0    | 6.0 |

Various obstacles to participating in education and training were cited by the respondents to the survey. Almost 50 % of the respondents did not participate because they did not want to. About 12 % did not participate but wanted to. The information on obstacles in this section was based on those who wanted to but did not participate in formal or non-formal education and training.

The most frequent reasons for not participating were family responsibilities (37 %), conflicting work schedule (35 %) and costs of participation (28 %). Reasons not frequently cited by respondents included ‘not confident of going back to school’ and ‘did not have the prerequisites’. Approximately 16 % of respondents stated lack of employer support as a reason for non-participation and 19 % selected ‘no facilities at reachable distance’.

Obstacles to participation in education and training, 2007 (%):

| Eu-27 | Respondent did not have the prerequisites |        | Training was too expensive or respondent could not afford it |        | Lack of employer’s support |        | Training conflicted with the work schedule |        | Respondent did not have time because of family responsibilities |        | There was no training offered at the reachable distance |        | Respondent was not confident with the idea of going back to something that is like school |        | Health or age |        | Other |        |
|-------|---|--------|--|--------|----------------------------|--------|--|--------|---|--------|---|--------|---|--------|---------------|--------|-------|--------|
|       | Male                                      | Female | Male   | Female | Male                       | Female | Male                                       | Female | Male  | Female | Male  | Female | Male  | Female | Male          | Female | Male  | Female |
|       | 14  | 13     | 26   | 30     | 21                         | 12     | 44   | 27     | 26  | 46     | 17  | 20     | 13  | 14     | 13            | 14     | 27e   | 22     |

Employers are the leading providers of non-formal education and training activities with almost a 40 % share, according to the survey. They are followed by non-formal education and training institutions, which provide 17 % of the non-formal activities.

Non-formal education and training institutions are normally understood to be institutions that offer systematic and intentional learning opportunities but do not usually provide formal educational qualifications. Examples of such institutions are adult education institutes, vocational training institutes, community learning centres, employment services, educational institutions like the folk high schools in Scandinavia, Germany, Austria and Switzerland but also private companies (e.g. language schools).

### 3 Employment

In the wake of the economic and financial crisis, employment growth in the EU-27 turned strongly negative (-1.8 %) in 2009 from +0.9 % in 2008, which in turn had already been low compared to the +1.8 % recorded in 2007. The EU-27 employment rate, i.e. the proportion of the population aged 15–64 years (the working-age

population) in employment, was 64.6 % in 2009, down 1.3 percentage points in comparison to 2008, thus almost receding to the level of 2006 and cancelling out the increases of 2007 and 2008. With employment declining throughout Europe in 2009, the trend of steadily rising employment of women was also halted. The employment rate for women in 2009 was 58.6 %, which was a decrease of 0.5 percentage points compared to 2008. In the EU, older people have a considerably lower employment rate than those aged 25–54. In 2009, 46.0 % of persons aged 55–64 were working compared to 78.2 % of 25–54 year olds.

However, despite the reduction in overall employment rate, the employment rate for older persons continued to rise, up 0.4 percentage points from the 45.6 % recorded in 2008. This increase was entirely attributable to the increased participation of older women. Employment rates for young people were also relatively low — only 35.2 % of those aged 15–24 were working in 2009, reflecting the fact that many were still in full-time education.

## **4 Unemployment**

In 2009, on average 8.9 % of the labour force was unemployed in the EU-27, which represented an increase of 1.9 percentage points with respect to the 2008 figure. In each of the 27 Member States the unemployment rate increased, with the exception only of Luxembourg, where it remained unchanged. In 2009, on average some 21.4 million persons were unemployed in the EU-27. This corresponded to 8.9 % of the labour force.

The economic downturn had more of an impact on the labour market situation of men than of women in 2009. As a consequence, in several Member States which had significantly higher unemployment rates for women, this gender gap narrowed, and overall the EU-27 showed similar unemployment rates for the two genders.

In 2009, 10.1 % of persons aged 18–59 (excluding students aged 18–24 living with other students) were living in households where no member was employed, the so-called jobless households. In the EU-27, a higher proportion of women lived in jobless households (10.9 % compared to 9.2 % of men).

## **5 Pensions**

In 2009, 17.8 % of people aged 65 years and over in the EU-27 were considered to be at risk of poverty. In all countries but Malta and the Netherlands women were much more at risk of poverty than men (20.1 % vs. 14.9 % at EU-27 level). At the EU-27 level the proportion of people living with an equivalised disposable income below the poverty threshold was higher in 2009 for the population aged 65 and more (17.8 %) than for the whole population (16.3 %). This was the case in 18 Member States as well in Iceland, Norway, Switzerland and Croatia. In Luxembourg, Hungary and the Netherlands the risk of poverty was significantly lower for the elderly.

## 6 Income Poverty

In 2009 16.3 % of people in the EU-27 were assessed to be at risk of poverty. In 2009 the proportion of children (under the age of 18) living in a household with low income (19.9 % at EU-27 level) was higher than for the population aged 18 - 64 (14.8 %) and for the elderly population (17.8 %). While the overall at-risk-of-poverty rate for the EU-27 was 16.3 %, individuals living in some household types were exposed to a much greater poverty risk than others. In EU-27 countries persons living in households composed of single parents with dependent children had the highest poverty risk – 34.0 %. Single adults older than 65 had an at-risk-of-poverty rate of 26.8 % (at EU-27 level). The poverty risk of single adults aged 65 and over was very unevenly distributed across Member States.

## 7 Life and Health Expectancies

Life expectancy in the EU-27 was 82.2 years for women and 76.1 for men in 2007. Healthy Life Years (HLY) measures the number of years that a person of a specific age is expected to live in good health, i.e. without any disability. The number of Healthy Life Years (HLY) expected for European citizens at birth reached 61.5 years for men and 62.3 years for women in 2007. These years represented 80.9 % and 75.8 % of the total life expectancy at birth for men and women, respectively.

Life expectancy and health life expectancy at birth (2007):

| EU-27 | Life expectancy at birth |       | Healthy Life Years at birth |       |
|-------|--------------------------|-------|-----------------------------|-------|
|       | Females                  | Males | Females                     | Males |
|       | 82.2                     | 76.1  | 62.3                        | 61.5  |

## 8 Significant country differences in adult learning

More than a third of the EU population between 25-64 years participate in formal or non-formal education and training. There are significant country differences in participation rates according to results from the first Adult Education survey. Young people participate more and there are minor differences between males and females. Most non-formal education and training activities are job-related. Employers and non-formal educational institutions are the most significant providers of non-formal education and training. Together they provide half of total nonformal activities. About 60% of employed participants are sponsored fully or partly by the employers. Nearly two thirds of the population do not participate in formal or non-formal education and training. The two most important obstacles to participation in education and training are work schedules and family responsibilities. There are however major gender differences in obstacles to participation.

Participation in formal or non-formal education and training by country, sex and age, 2007:

| COUNTRY | Sex   |      |        | Age         |             |             |
|---------|-------|------|--------|-------------|-------------|-------------|
|         | TOTAL | MALE | FEMALE | 25-34 years | 35-54 years | 55-64 years |
| EU avg  | 35.   | 36.1 | 35.4   | 44.7        | 37.2        | 21.6        |
| BG      | 36.4  | 37.9 | 35.0   | 44.7        | 39.7        | 20.3        |
| DE      | 45.4  | 48.3 | 42.4   | 42.4        | 48.7        | 28.2        |
| EE      | 42.1  | 36.9 | 46.7   | 52.5        | 42.6        | 27.5        |
| EL      | 14.5  | 14.3 | 14.6   | 22.7        | 14.0        | 5.1         |
| ES      | 30.9  | 30.8 | 31.0   | 39.7        | 30.8        | 17.0        |
| FR      | 35.1  | 36.4 | 33.8   | 48.2        | 35.9        | 16.2        |
| IT      | 22.2  | 22.2 | 22.2   | 30.5        | 23.0        | 11.8        |
| CY      | 40.6  | 43.0 | 38.2   | 53.2        | 41.1        | 20.1        |
| LV      | 32.7  | 25.9 | 39.0   | 39.0        | 34.3        | 21.8        |
| LT      | 33.9  | 28.7 | 38.7   | 42.7        | 35.1        | 19.0        |
| HU      | 9.0   | 8.3  | 9.6    | 15.8        | 9.0         | 2.5         |
| AT      | 41.9  | 44.0 | 39.9   | 47.1        | 45.7        | 25.4        |
| PL      | 21.8  | 21.3 | 22.4   | 34.1        | 20.7        | 6.8         |
| SK      | 44.0  | 45.3 | 42.8   | 51.0        | 48.3        | 23.8        |
| FI      | 55.0  | 48.9 | 61.3   | 66.0        | 58.6        | 37.8        |
| SE      | 73.4  | 70.8 | 76.1   | 81.0        | 76.4        | 60.7        |
| UK      | 49.3  | 47.2 | 51.3   | 58.8        | 50.3        | 37.0        |
| NO      | 54.6  | 53.3 | 55.9   | 65.0        | 55.5        | 41.2        |

Total rates of participation vary between countries and the data shows the Nordic countries and the UK having high rates of participation. Low rates of participation are found in Hungary, Greece, Poland, and Italy. The European average for the 17 countries represented indicates a slightly higher rate of male (36.1%) participation in education and training than for females (35.7%). There are however varying gender differences in a number of countries. Countries with high participation rates like Sweden, Finland, Norway and UK have a higher proportion of females than males participating in education and training. Finland, Estonia and Latvia have over 10% more participation among females than males. There are minor gender differences in participation in countries with low participation rates like Hungary, Greece, Poland and Italy. Germany, France, Bulgaria, Cyprus and Austria have higher participation rates for males than females. There is generally a low participation rate in the age group 55-64 but there seems to be a higher proportion in this age group participating in education and training



in countries with high rates of participation. Sweden differs considerably from the other countries with a participation rate for this age group of 60.7%, followed by Norway (41.2%), Finland (37.8%), United Kingdom (37.0%) and Germany (28.2%). The biggest differences between the young age group 25-34 and the older age group 55-64 are found in Hungary (15.8%, 2.5%), Greece (22.7%, 5.1%) and Poland (34.1%, 6.8%).

## **9 Active ageing and the role of social integration and volunteering among the European elderly**

### **9.1 Active ageing**

Over the last years the concept of active ageing has been strictly related to health and the importance of healthy ageing. This approach focuses on a broad range of activities that emphasises the participation and inclusion of older people as full citizens. The essence of the concept of active ageing combines the element of productive ageing and the emphasis on quality of life and mental well-being. Thus an active ageing strategy should cover the whole of the life course, because is concerned with how everyone ages, and not only with older people. So the vision behind the active ageing strategy is a society for all ages, in which all are valued and where everyone has an opportunity to participate and contribute regardless their age. In the third age, after retirement or during partial retirement, people should have opportunities to contribute in a variety of ways (paid employment, voluntary work, community participation, family activities and leisure), or a mixture of them, where special attention to nutritional aspects of healthy lifestyles is needed. Maximising citizens' potential and quality of life can create a more inclusive society and can further economic sustainability.

### **9.2 Social integration**

Studies show that social integration is very important for the wellbeing of dependent elderly persons living at home: social activities and contacts improve their wellbeing. Because of the changes in family structures, dependent elderly persons are more frequently finding themselves living alone. An emphasis on measures that encourage more social integration of the dependent elderly should stimulate a decrease in their rates of depression, and consequently, allow a reduction in their demand for care. The major results of this analysis are: health perception is strongly and positively correlated with satisfaction with one's main activity.

Staying at home can lead to adverse consequences, such as isolation: social activities, keeping active and busy, and meeting other people are important for retaining an interest in life, avoiding depression and, consequently, for wellbeing. Current social policy in Europe regarding the dependent elderly aims at making it easier to stay at home, essentially by providing assistance in the elementary activities of daily life.

### **9.3 Family links, intergenerational relations**

Changes on family structure and job mobility during last decades have their consequences on elder relations. This changes occurred in all Europe but depending if we look at northern, eastern or southern Europe, the phase of the phenomenon is diverse. On

the other hand social construction of age and younger interaction practices have diminished the interaction among various generations.

Studies show that interaction with family or younger generations are crucial for elder quality of life. In this sense, public policies on elder dependence can help to increase family interaction or care. Besides, evaluated programs on intergenerational practices demand from their users to expand and improve them due to the social benefits achieved. And not only to feel integrated with younger generations, but also to feel they contribute to teach from their experience and knowledge.

## 9.4 Elderly volunteering and well-being

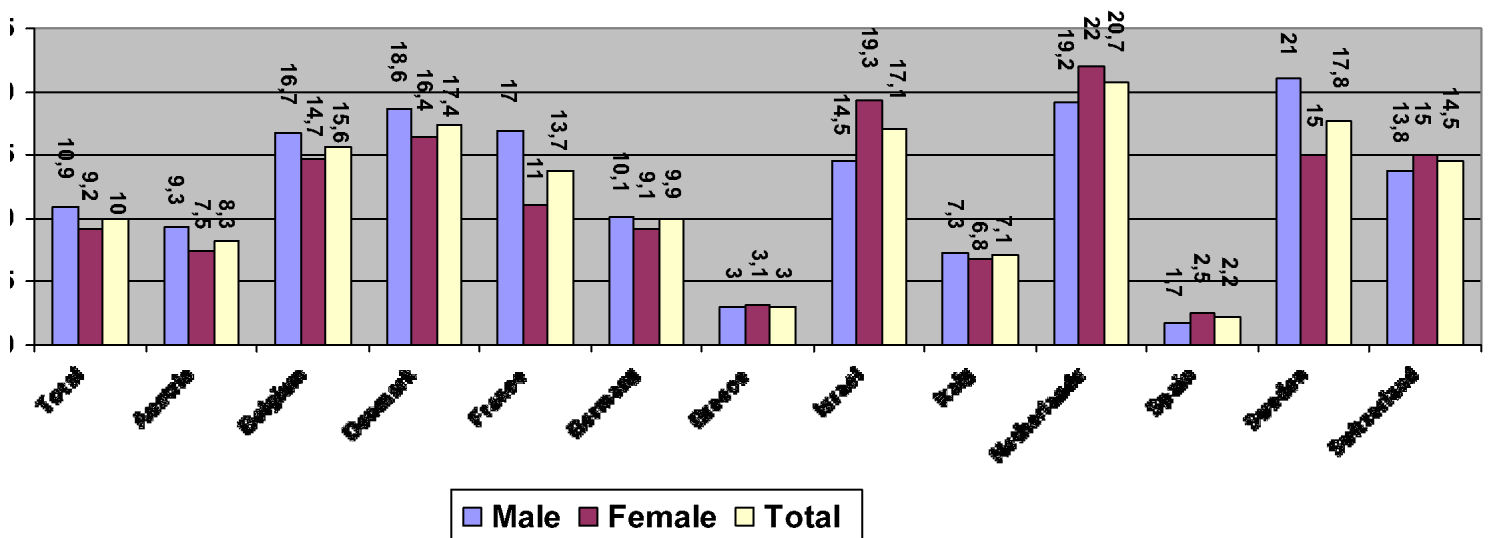
Studies conducted in 2009 and published in October 2009 show that there is an overall positive correlation between volunteering and perceived health, life satisfaction, and self-life expectancy, and a negative correlation to depression.

As people get older and enter their third-age they find volunteering a good substitute to the social roles they lost. Elderly volunteering can have a positive social impact, on society as well as on older volunteers, providing services otherwise unavailable or expensive. Volunteering by older people can help eliminate isolation, strengthen community participation, enhance volunteers' self-esteem, change stereotypes, and promote social and political consciousness.

By helping others, older volunteers can also help themselves and enhance their physical, mental and social well-being, protecting from the pitfalls of retirement, physical decline and inactivity. The social integration related to volunteer work can enhance one's well-being, since the reduction of social isolation can lead to less depression.

A few cross-national studies were undertaken on volunteering and demonstrates that the picture of volunteering rates, perceptions and impact are not the same in all states and cultures. High participation rates in Northern Europe and low participation rates in Mediterranean countries are demonstrated.

Voluntary or charity work done last month, by country and gender (weighted %), n=30.023:



## 9.5 ICT uses as active ageing and social integration platform

As a general increasing phenomenon in our societies, most ways of contribution to social volunteering or active ageing are more and more mediated through cyberspace, so full citizenship is also to let opportunities for elder people in using ICT. Furthermore, digital tools are mostly related to work, a phase of life that many elder abandoned in a recent or far past. This fact reinforces the idea of a long life learning, inside or outside job life. As volunteering associations base their communication on cyberspace, elder need the skills to cope with the information flows of the institutions they are engaged.

In the same way, for those elderly persons living at home, ICT can be developed as a helpful tool to keep in touch. Not as a substitute of face-to-face interaction but as devices that reinforce interaction. We know that this is still the beginning of new forms of interaction, so best uses to underpin intergenerational, neighbourhood or others relations could increase life quality for elder.

In third place, being socially integrated means to be informed. Information society flows through cyberspace and requesting accurate and authoritative information means access, skills and habits to use the internet. That happens to be crucial in a continent in accelerated social changes. So a healthy democracy also depends on at least having access to information and the possibility of being active in the construction of these future societies.

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## Change log

| Name           | Date       | Description  |
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| Vicent Querol  | 01.04.2012 | Chapter 9.3 (Family links, intergenerational relations)                |
| Vicent Querol  | 03.04.2012 | Chapter 9.5 ICT uses as active ageing and social integration platform) |



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### Lifelong Learning Programme

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