



Education and Culture DG

Lifelong Learning Programme

Evaluation toolkit on seniors education to improve their quality of life

518227-LLP-1-2011-1-ES-GRUNDTVIG-GMP

Document type: Deliverable Nr. 2.1.d.

Title:	Analysis research Educational Models
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Work Package: 2

Editor: Luis Ochoa

Dissemination Level: Public

Status: Closed

Preparation Date: December 2011- April 2012

Version: 2.0

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This project has been funded with support from the European Commission. This communication reflects the views only of the author, and the commission cannot be held responsible for any use which may be made of the information contained therein.

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1. Executive Summary

The report aims to explore senior education models in Europe: Formal, non-formal and informal education in Europe. The data used for this research are mainly from Eurostat, the statistical office of the European Union, Unit F4: Education, science and culture. The Metadata was last certified the 20 April 2011. The main concepts and definitions we use in this report are the ones are used in Eurostat. Lifelong learning we mean all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences.

2. Introduction

Questions concerning formal education are not entirely governed by the laws of the European Union. Each state makes its own education policy, outlines its objectives and guidelines. According to Article 126 of the Maastricht Treaty and Article 76 of the European system, the European Commission encourages its members to cooperation in the field of education (Cabero, Barroso and Gonzalez, 2007).

One aspect of this cooperation is the ability to study and work in any state in the Union. The realization of this assumption allows the system of mutual recognition of diplomas, periods of study and training, in force in all member states (Shield, 2008). The countries (Poland from 1984), members of the UNESCO Convention recognizes the research and higher education diplomas and degrees in the states that comprise the European Union.

European education means the incorporation of new values to the national education system, to create a common future. The dimension of the European value means the need to strengthen the sense of European identity among the member states. European education policy this translates into a significant role to the principle of equality, promoting continuing education, education ending with the acquisition of high school.

Millions of people want and be able to complete their education / training throughout their adult life, either by self-interest or because it is claimed from the economic sphere. Accept that men and women can learn throughout life, gives equal among youth and adults. According to Hughes (1999) the European dimension of education also refers to the new role that education has to play against immigrants and ethnic minorities. With regard to mass migration is necessary to create intercultural education models, suitable for all groups.

The policy of the European Union specifically, roughly, the following priorities:

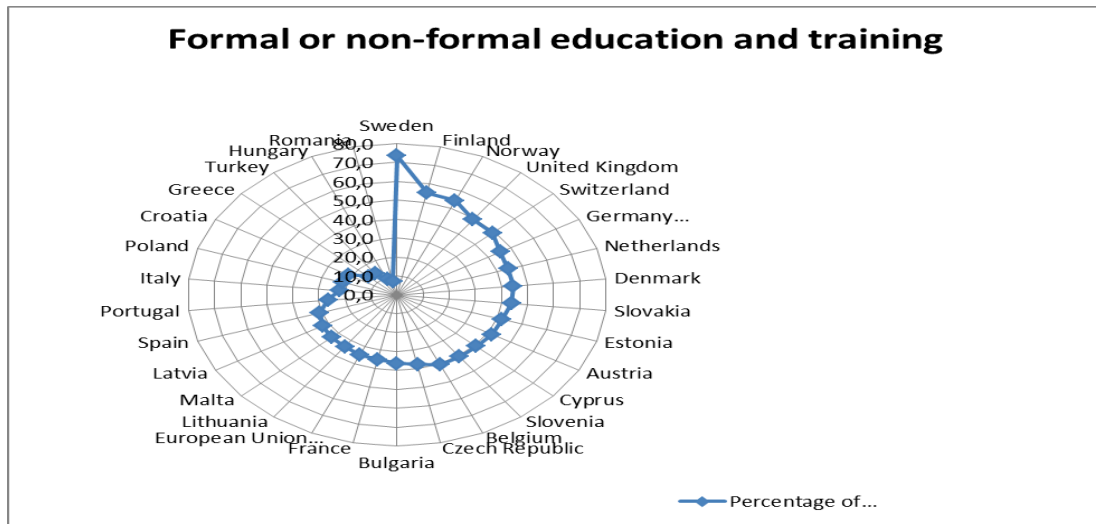
- Equal educational opportunities regardless of gender, nationality, language, religious affiliation, national origin, disability, etc..
- Raising the quality of education through curriculum reform, eliminating the encyclopedic, using the successes of science and technology, the reform of vocational guidance and counseling, etc..
- European Education - "world citizen" - enhancing teaching and learning two foreign languages, religious tolerance, racial and social, according to the spirit of the Human Rights Convention European Council.

The European Union countries recognize each other, school diplomas and degrees of compliance studies. This allows students to continue their education, professional practice and job search in any member state.

The education policy of the European Union is based, among others, the following objectives:

- Improve the quality of teaching
- Disseminate the languages of member states
- Promote the exchange of students and teachers
- Develop cooperation between universities
- To promote distance education

We can affirm that education that takes place in formal education and in training systems is the most visible and recognized not only in the labor market by also by the society in general. But in the last decade we can find that there has been a growing appreciation of the importance of learning in three forms of education: Formal, non- formal and informal. To be able to understand properly this document we should define properly the three form of learning.



Participation rate in education and training by age groups The target population is individuals between the ages of 25 to 64 years old. The table shows the target population and sample sizes. Adult Education Survey, Eurostat 2011
<http://epp.eurostat.ec.europa.eu/portal/page/portal/education/data/database>

3. Formal – Informal – Non formal Education

3.1. Formal education

Education in the formal system includes teaching in the school system - at elementary school, middle school, vocational schools, secondary schools, post-secondary schools, as well as at the level of education higher education with the different levels: Bachelor, Master and PhD level.

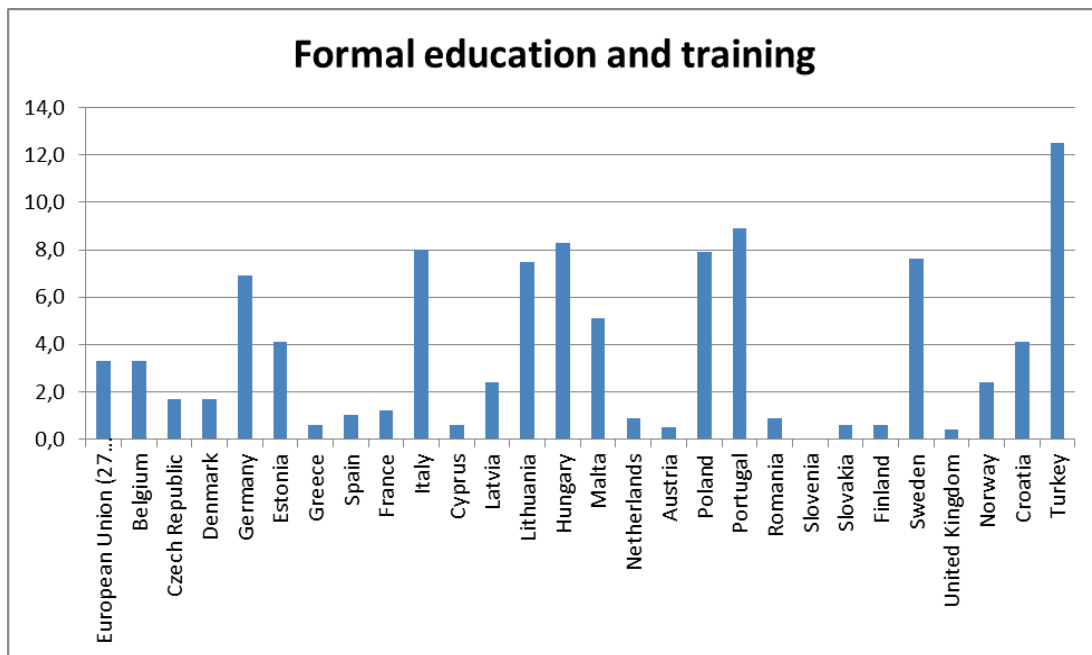
This type of education is associated with the regular form of learning. Education conducted by the school and educational institutions, public and private, authorized by the Ministers of Education, local government or an Institution created by the governments to coordinate and implement the studies plans for teaching. Educational activities may be conducted by legal and natural persons and shall be in accordance with approved programs of teaching.

The training is based on the standards adopted in the school system and secondary and higher education approved by the applicable regulations

law of each European country. Education leads towards a qualification validated certificate, certificate of graduation, certificate, diploma.

The formal education is provided in the school system, in the types of schools operating under the Education Acts, particularly in primary schools, secondary schools, vocational schools, secondary schools, supplementary high schools , high schools profiled, techniques, complementary techniques, post-secondary schools and higher education schools. They are characterized by the presence of the person conducting activities (professor / teacher / lecturer).

Students are the recipients of education at all levels of education - from primary through to higher education (including studies doctoral), regardless of the form of study (full-time and part-time).

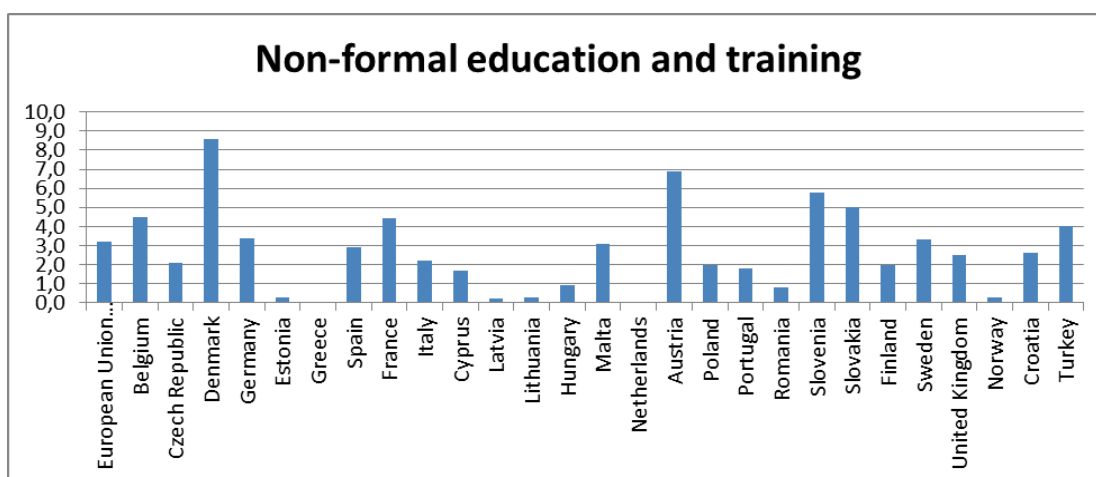


Source of Data: Eurostat 2007

3.2. Non-formal Education

Participation in education outside the formal system covers all organized educational activities that do not meet the definition of school education, most of the time, they are not provided through formal educational institutions. It applies to all types of further education and training outside the school system in which the person participated after leaving the formal education system. The non-formal education, unlike in the case of formal education, does not changes in the level of education. Such instruction is carried out usually in the form of courses, training, tutorials (could be done in the workplace or outside it), seminars, conferences or lectures, to which the respondent volunteered and attended.

In this type of education we can place the Third Age Universities. For this type of education can also be include private lessons (eg foreign languages), as well as distance education, which takes place via snail mail, e-mail or any electronic media (eg computer, video, DVD).

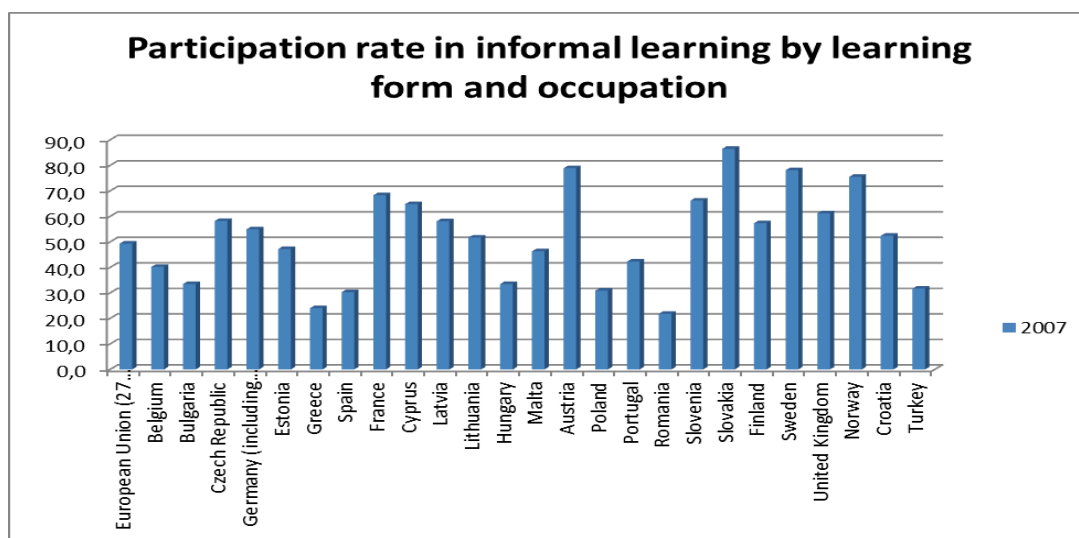


Source of Data: Eurostat 2007

Outside the formal education system education usually leads to the development, expansion and acquisition of skills in different areas of professional, social and cultural development. In contrast to non - formal learning, formal education should take place through the lecturer, instructor, teacher or coach and lead to a Diploma or degree. In the non – formal education, classes can be taken out of the education center or in a educational center but the course is for improvement or training qualifications and may lead to skills needed in society (eg, self-defense course) or for personal benefits, their own intellectual development or hobbies like: cooking course, lectures the history of art, modeling course.

3.3. Informal Education (independent study)

It is the independent learning in order to obtain knowledge or training skills. Self-study in contrast to the formal and non-formal education should take place without the participation of the teacher. Training of this kind is also organized forms of education outside of school and after-school (not to be taken into account courses, training courses and lectures with an instructor).

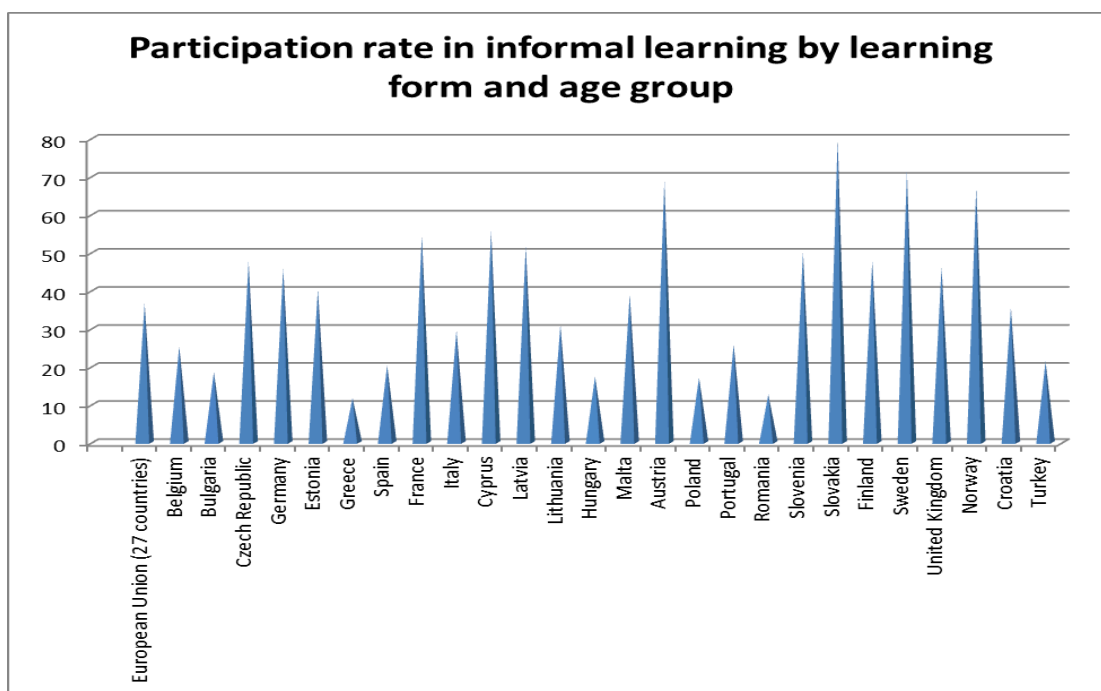


Source of Data: Eurostat 2012-03-06

Informal learning (independent study) may be considered expedient, but it is less organized and may include, for example, events related to education or activities that occur within the family, workplace and in everyday the life of every person, in the context of education led by the family and society.

The methods used for self-education are:

- use the help of family members, friends, coworkers, for example: the use of advice, someone watching the performance of some tasks, consult and consult another person,
- use of printed materials - it should be understood to use literature, published earlier in the traditional - paper form (books, scripts, professional press, such as "Legal newspaper") to raise awareness. A person reached when these materials on their own initiative and it was not part of the curriculum for the course, recommended by the teacher / instructor (that was not part of the homework),
- use of computer programs and networking opportunities the Internet - means use through your Internet connection (on-line) with different types of guides, books, trade press, language courses etc.
- use of educational programs broadcast by television and radio,
- guided tour of the museum,
- visits to research centers, such as libraries, combined with the use of their information resources.



Source of Data: Eurostat 2012- From 55 to 64 years

The following Table provides the estimates and confidence limits for participation rates in formal, non-formal and informal education for some countries. The intervals calculated in the table are calculated on the basis of the AES microdata provided to Eurostat (assumption simple random sample) and are therefore not taken from the quality reports.

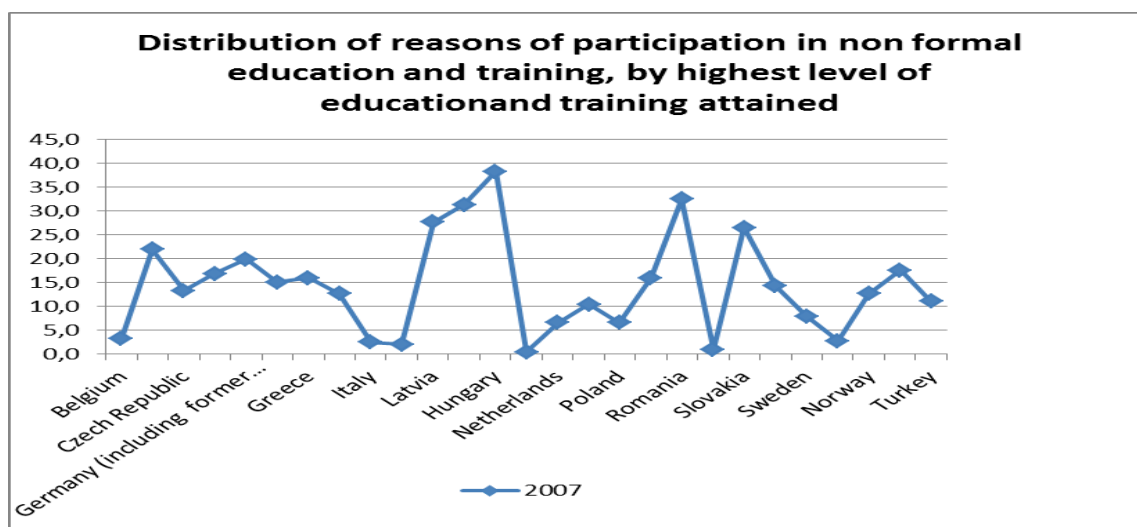
Confidence limits¹ for participation in AES survey:

Country	Participation rate (%)		
	Formal education	Non-formal education	Informal education
Austria	4.2 ± 0.6	39.4 ± 1.4	75.7 ± 1.2
Belgium	12.5 ± 0.9	33.5 ± 1.3	34.9 ± 1.3
Bulgaria	2.7 ± 0.4	35.2 ± 1.3	28.0 ± 1.2
Cyprus	2.9 ± 0.5	39.5 ± 1.4	63.6 ± 1.4
Czech Republic	3.9 ± 0.4	35.3 ± 1.0	54.7 ± 1.0
Estonia	5.0 ± 0.7	40.2 ± 1.6	44.8 ± 1.6
Spain	5.9 ± 0.4	27.2 ± 0.7	28.0 ± 0.7
Finland	10.2 ± 0.9	51.2 ± 1.5	54.6 ± 1.5
France	1.7 ± 0.2	34.1 ± 0.7	63.8 ± 0.8
Germany	5.2 ± 0.5	43.1 ± 1.2	52.4 ± 1.2
Greece	2.3 ± 0.4	12.7 ± 0.8	20.7 ± 1.0
Croatia	4.5 ± 0.7	18.4 ± 1.4	44.6 ± 1.8
Hungary	2.5 ± 0.4	6.8 ± 0.6	26.2 ± 1.0
Italy	4.4 ± 0.2	20.2 ± 0.5	41.2 ± 0.6
Lithuania	6.3 ± 0.8	30.9 ± 1.5	45.3 ± 1.6
Latvia	5.4 ± 0.9	30.7 ± 1.9	53.9 ± 2.0
Netherlands	6.8 ± 0.9	42.1 ± 1.7	² —
Norway	9.9 ± 1.1	50.6 ± 1.8	72.3 ± 1.6
Poland	5.5 ± 0.3	18.6 ± 0.5	25.4 ± 0.5
Sweden	12.7 ± 1.1	69.4 ± 1.5	76.0 ± 1.4
Slovenia	8.7 ± 0.9	36.1 ± 1.5	62.0 ± 1.5
Slovakia	6.1 ± 0.7	41.2 ± 1.4	84.1 ± 1.0
UK	15.1 ± 1.2	40.3 ± 1.6	53.7 ± 1.6

Note: Participation rates are calculated from microdata sent to Eurostat Adult Education Survey (AES, 2006 - reference period: 12 months). Eurostat 20 April 2011 (http://epp.eurostat.ec.europa.eu/cache/ITY_SDDS/en/trng_aes_esms.htm)

¹ The confidence limits at 95% level of significance

² Netherlands used some new variables for informal learning, which were totally different from those suggested in the Model Questionnaire



Reason: To be less likely to lose job

4. The formal, informal and non-formal education in Poland

Polish specialist literature and demographical statistics define the elderly as a community of people in post-productive age (women in the age of 60+, men in the age of 65+). However, sometimes one age limit, i.e., 60 years old, is indicated for both sexes as forming the borderline of old age, this being based on the real, lower than statutory, retirement age. On the other hand, international statistics define this lower age limit as 65, regardless of sex. Numerous studies concerning seniors present this community as further broken down according to the advancement of age. Thus, the following thresholds of old age are mentioned: the first threshold includes the group of the so-called “young elderly”, or the older population, and is marked by the moment of statutory termination of professional activity.

This stage of life is also referred to as the initial old age. The second threshold creates a group of population aged 75+. This age entitles to claiming attendance allowance, and, as such, forms a borderline of a decline of physical fitness and health. This group is commonly referred to as “seniors”, while the stage of life between the ages of 75 and 85 is termed “advanced old-age” in the specialist literature. The third threshold of oldness, relating to people of the age of 85+, is relatively scarcely described in literature. Occasionally, the term of “deep old age” is used with reference to this group³.

The mean age in Poland is on the increase. People over 65 years of age constitute a considerable part of the Polish society. This is caused, inter alia, by the reduction in the number of births, achievements of modern medicine, improvement of social and economic conditions, and, consequently, by a regularly increasing life expectancy. In Poland, until now, there has been no comprehensive, full research concerning the elderly.

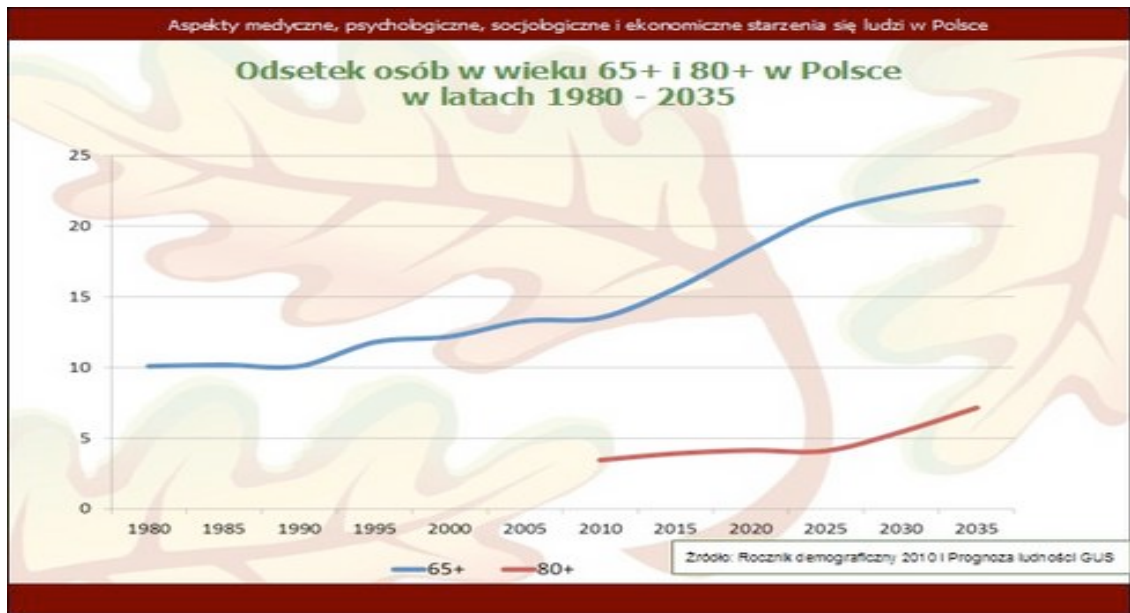
The most extensive research was conducted within the framework of the PolSenior project. PolSenior is a large-scale research program which provides data on the physical condition and socio-economic situation of the elderly, entitled “*Medical, psychological and socioeconomic aspects of aging in Poland*”. The PolSenior research involved 5695 participants: 4979 respondents over the age of 65, and a group on the verge of old age – 716 subjects aged 55-59.

³ D. Głogosz, Seniorzy w Polsce: podstawowe dane statystyczne, <http://www.malzenstwoirodzina.republika.pl/mir12.html> (retrieved on 04.02.2012)

Due to the regularly progressing aging of the Polish society, the state authorities must be prepared for appropriate actions and reforms. The results of the PolSenior study should become a useful tool for policymakers who, in short perspective, will be forced to develop programs and undertake steps which will allow for minimizing the costs of adverse demographic processes by, inter alia, extending the periods of professional activity of the seniors and developing targeted programs improving their quality of life⁴.

Promoting a healthy and active aging thus becomes an important challenge for the European countries. Longer life in good health means better life quality and, doubtlessly, a higher level of independence.

In 1968, the percentage of population aged 60+ exceeded 12%. A forecast prepared by the Central Statistical Office (GUS) assumes that the share of population in post-productive age will increase by 2035 by 11% with regard to 2007, and will amount to 26.7%. The Central Statistical Office also estimates that approximately over 100,000 people will reach post-productive age each year. It is expected that this increase might even be doubled between 2010 and 2020. The UN forecast appears even more frightening. This seems to be the last chance to deliberate on the health, social and economic situation of the Polish seniors.



Source: PolSenior study, Małgorzata Dudek, To nie jest kraj dla starych ludzi, 06.11.2011

<http://magielfinansowy.nowyekran.pl/post/36597,to-nie-jest-kraj-dla-starych-ludzi>

PolSenior findings:

- nearly 30% of those surveyed reveal continuous symptoms of depression which is neither diagnosed, nor treated;
- nearly 40% suffer from chronic pain;

⁴ PolSenior large-scale research of the elderly in Poland: <http://www.zycie.senior.pl/147,0,Najwieksze-w-Polsce-badanie-osob-starszych-PolSenior,12431.html> (retrieved on 04.02.2012).

- nearly every third senior suffers from cataract, every fourteenth suffers from glaucoma, and every fiftieth suffers from a diagnosed Age-related Macular Degeneration (AMD);
- every third person above the age of 65 suffers from hearing difficulties;
- almost 28% of the surveyed persons over the age of 65 show slight or moderate symptoms of dementia;
- nearly every twentieth respondent features considerably impaired cognitive functions which preclude independent existence;
- nearly one-third of those surveyed suffer from chronic kidney disease;
- nearly one-fourth of the respondents fell down in the past year;
- nearly every second female who fell down suffered from a number of injuries, ranging from bruising and minor lacerations to broken legs and broken upper extremity of femur, which may even result in death;
- over 75% of the senior population suffer from high blood pressure; fortunately, this is subject to ever better supervision;
- nearly 45% suffer from an impaired glucose absorption, and half of them is diabetic;
- nearly 20% of seniors live alone, despite the fact that the majority of them (93%) have living children;
- families composed of a single old person and their children constitute 8% of those surveyed within the PolSenior research; married seniors living with their children amount to 14.3%, while those living with their grandchildren constitute less than 1% of seniors;
- 60% of the respondents claim that they do not require regular aid on the part of their families or other persons;
- merely 17% of the seniors do not have to save money, the remaining group live very modest lives, saving even on food, and are sometimes left with no money for clothing.

Polish researchers also performed an analysis of interrelation between activity and health of the tested senior population, which included an analysis of the quality of life of the Polish people performed on the basis of an index which comprises eight factors, i.e., social capital, psychological, physical and social wellbeing, level of civilization, financial status, stress of life events, pathologies⁵, which, in turn, may be further divided into three spheres: health, lifestyle and social relationships. The above-mentioned analysis showed that among 147 socio-demographic and professional groups existing in Poland in 2009, people aged 60-64 are ranked at 131st position, the pensioners are ranked 135th, while seniors over the age of 65 are ranked at the 143rd out of 147 possible positions. This implies that the broadly defined quality of life of the elderly is one of the lowest in Poland.

Factors affecting the perception of quality of life of the elderly referred to by Anna Brzezińska and Szymon Hejmanowski include⁶:

- resources and abilities, attitudes towards oneself and the environment, brought into the last stage of life. These are gathered throughout the entire life (childhood, puberty, adulthood).
- process of aging and weakening, state of mind and health, ability to cope with everyday tasks. These are the current inner resources.

⁵ J. Czapiński, T. Panek, *Diagnoza społeczna. Warunki i jakość życia Polaków 2009*, Warsaw 2009, p. 357

⁶ As quoted in Anita Gębska-Kuczerowska, *Charakterystyka grupy osób w podeszłym wieku uczestniczących w badaniu zależności między aktywnością a stanem zdrowia*, *Przegląd Epidemiologiczny*, http://www.pzh.gov.pl/oldpage/przegląd_epimed/56-3/563_10.pdf

- previous life environment, including its stimulating or hampering effects on development and realization of an individual's potential. These are a sum of all previous external resources of an individual.
- current attitude of others towards the seniors. This concerns both relatives/friends and those whose help, information and care is used by the elderly in diverse institutions, e.g., in stores, hospitals, clinics, etc. These constitute the current external resources of the seniors.
- As A. Brzezińska notes, the research conducted points to diverse positive effects of late life learning. These include maintaining good health, coping better with everyday challenges, accepting greater responsibility for one's own life, achieving greater independence from others, better usage of one's resources, developing reflectiveness (self-awareness, insight), following the development of science and technology, broadening one's knowledge of the modern world, learning one's rights and appreciating one's role in the society.
- Other institutions or organizations for the senior citizens include: senior clubs, community centers, women's associations and cultural and educational institutions, e.g., museums, libraries, theatres.
- The elderly, in many cases having a substantial amount of spare time, may engage not only in occupations allowing for self-realization, but may also help others. There is a wide range of possibilities, including involvement in activities of diverse organizations, foundations, associations, self-help groups, as well as assumption of new family roles (those of a grandmother or a grandfather) and civic roles (e.g., lay judges, members of local governments). Voluntary work is also of substantial importance for the seniors. Such activities are directed towards both members of their own communities and other people in need. They may be of both ad hoc and organized nature.

Such avocations provide an opportunity for putting into service the experience of the elderly and open the perspective of further development and sense of ability to help. Reasons for doing voluntary work, enumerated by the seniors, include: *"they want their life to be more meaningful, more valuable, they want to escape from loneliness, they want to feel needed and useful"*. This type of occupation prevents the feeling of loneliness and isolation of the elderly. It also shows that the seniors are able to fight for their due place in the society.

One of the numerous transformations of this age is the ubiquity of new media, the knowledge of which often determines one's functioning in the society. Digital technologies have become a strategic element in the lives of modern societies, as they allow for satisfying multiple human needs. Lack of basic skills within the area of the new media shifts some individuals to the social margin. Further research provides the answer to the question about the scope and method of influencing the lives of the seniors by the new media⁷.

As has been confirmed by the results of the research conducted by Megapanel PBI/Gemius on a group of 16647 subjects, currently, a regular, though slow, increase is observed in the activity of persons over the age of 55 within the scope of Internet usage. In February 2005, the Internet was used by 300,000 people of this age group (3.4% of all Polish Internet users), while in 2008 – over one million. Elderly people spend more and more time browsing the Internet resources – in October 2008 it was on average 32 hours per month. For comparison, Japanese Internet users aged 55+ use the global Net on average for 2.4 hours a day⁸.

⁷ Ł.Tomczyk, Seniorzy w świecie nowych mediów

(<http://www.e-mentor.edu.pl/artykul/index/numer/36/id/776>, retrieved on 02.02.2012)

⁸ Ł.Tomczyk, Wybrane aspekty kształcenia seniorów z zakresu technologii informacyjnej w dobie społeczeństwa informacyjnego, [in:] C.M. Olszak (ed.), Informatyka w nauce, dydaktyce i praktyce gospodarczej. Zeszyt naukowy nr 19, Śląska Wyższa Szkoła Zarządzania, Katowice 2008.

The newest research, conducted in 2009 by the Council for Social Monitoring [*Rada Monitoringu Społecznego*], shows that the percentage of seniors using PCs had risen slightly – by 2.5% in the span of two years (with regard to the 2007 research results). Therefore, despite an intense quantitative and qualitative development of e-services, improvement of data transfer possibilities, implementation of the concept of lifelong learning (inter alia, through such institutions as Universities of the Third Age), the oldest group of the society is considered among the least numerous in the computerized space.

Table 1 presents the results of the research conducted by D. Batorski within the area of usage of new digital technologies in various age groups.

Age	Computer	Internet	Mobile phone	Do not use modern technologies	Do use all three technologies
60-64	18%	14%	47%	49%	12%
65 +	5%	4%	22%	77%	3%

Source: D. Batorski, Uwarunkowania i konsekwencje korzystania z technologii informacyjno-komunikacyjnych, [in:] J. Czapiński, T. Panek (ed.), Diagnoza społeczna 2007, Rada Monitoringu Społecznego, Warsaw 2007, p. 280

The research shows that only 5% of the seniors use computers and a mere 4% uses the Internet, thus, solely 4% would be able to enroll in courses involving Internet application. Therefore, what we are dealing with is not only a shortage of potential participants of e-learning courses in this age group, but also, more importantly, a vital issue of the digital divide (digital gap, digital illiteracy), manifest through the alienation of a considerable part of the population and their deprivation of the opportunity to benefit from e-services⁹.

The progress of communication technologies and IT certainly has a great impact on the education of the elderly, thus, the research results presented above may be outdated and should be supplemented and extended by other, not yet researched, areas of educational activity of the seniors.

Completion of the QEduSen project will help identify and define the current areas of formal, informal and non-formal education of the seniors, determine the most expected forms of such education, and, consequently, result in an increase in their quality of life.

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Change log

Name	Date	Description
Name of the person that did the modification	Date of the modification	Short description of modifications done
Luis Ochoa Siguencia	25.01.2012	Informal education