The learning society as a greying society: perspectives to older workers and lifelong learning

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Abstract

This paper suggests that there is a need to expand the concept of ‘learning in adulthood’, on one hand, and the concepts of ‘work’ and ‘career’, on the other. The purpose is to find a better match with the extended human lifespan (longer lives) and the prevailing thinking on lifelong development and continuous change in working life and society. The goal of this paper is two-fold. First, it aims to describe the situation of and discussion on lifelong learning of older (45+) workers. Second, it seeks to expand this discussion within VET on one hand and in regards working life on the other. The approach is limited to work-related learning, acknowledging the increasingly blurred line between work-related versus non-work-related learning. Both the resource and deficit perspectives to older workers are covered and a complementary approach is suggested, as they often appear together. The paper is divided into three main parts. In the light of the two lines of discussions, on older workers and lifelong learning, the first part describes how the recent historical development has become to challenge the old-age based social institutions and their formation as the traditional basis of old age construction. The combination of lifelong learning and extended careers seems to promote a more ageless or age-irrelevant society than our current one. The second part relates the discussion on the knowledge society and changing competence needs. The review older workers’ learning participation shows that lifelong learning is not yet a reality for most of older workers. However, the situation varies widely between the European countries and the recent years have marked a rapid change in some countries. The third part reviews human resources development and learning in the workplaces as the places if lifelong learning is to become a reality for older workers. The discussion relates to the dilemma between high value of informal, experiential learning and low value of older workers. It also points out how structures and organising of work and workplace often lie behind the decreased performance flexibility related to long careers, and how these can damp down options for learning and development or the sense in that for mature minds. Finally, the paper characterises existing research in this area and makes some recommendations for research, policy and practice.
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1. Introduction

1.1. The purpose

The purpose of this paper is two-fold. It aims to describe the situation and discussion of lifelong learning of – and for – older workers (45+) (more on older worker definitions in Box 1). It also aims to advance and expand this discussion in regards working life and VET. Older workers and their situation have been widely discussed in the context of the labour market and working life. It has been argued that older workers are faced with a situated necessity to continue learning in order to maintain their employability and increase their flexibility in the labour market (Hake, 2006). In VET or CVET provision, however, they have so far not played any significant role. Training provision particularly targeted to or addressing the needs of older adults hardly exists at the moment (Findsen, 2006). Likewise, researchers have only showed limited interest in older workers’ learning. However, political interest in the theme has rapidly increased since the 1990s, along with the coming of lifelong learning discussion and fuelled by the goals set for 2010 in the Lisbon strategy.

This paper suggests that, on one hand, there is a need to expand our narrow thinking of learning and/in adulthood as these became understood under the adult education theories and practice in the 1980s, in particular in the working life context. On the other hand, this paper calls for rethinking the conceptualisation of working and careers, in particular in the context of extended lifespan. At the same time as the paper seeks to expand our traditional mind-sets about these two concepts, it also promotes a more integrated and comprehensive thinking about them. Recently a good deal of work has been initiated to make working life more inclusive, but there is still a long way to go when it comes to older workers. A prerequisite for the success in this line of thinking is that, unlike the case so far (Tikkanen and Nyhan, 2006a), the voice of older workers be heard both in the workplace and in society more generally.

There is some ambiguity when it comes to the discussion of older workers and their contribution in working life. On one hand, the deficit approach emphasises physiological decline and other limitations (Findsen, 2006). From this perspective the knowledge, skills, and attitudes (from here on generally referred to as job-competence) of older workers are typically seen as obsolete and lacking. This view is common among employers (Walker, 1997a; 1997b), regardless of the fact that job-competence is rarely systematically monitored in workplaces, for any group of employees. Taken the prevalence of this view, there has also been surprisingly little interest among employers in the learning and development needs of older workers or in investing in them (van der Heijden, 1998). On the other hand, the other perspective, which we could call a resource (asset) approach, has tried to point out the particular strengths in older workers’ job-competence, their added value in working life.
Box 1: Who is an older worker?

In the European discussion, particularly in the Nordic countries, an age limit of 45 years has often been used for defining an older worker (Tikkanen and Nyhan, 2006b). Statisticians also tend to take the age of 45 as the demarcation between being a younger (24-44 years) or an older worker (45-64 years) (Descy, 1996). Sociologist have pointed out how age is socially constructed – implying an imposition of false generalisations, distorting stereotypes, and the suppression of differences (Manheimer, 2005) – and that age-definitions (Marin, 1996; Phillipson and Walker, 1986) are always positioned to the particular historical time (Featherstone and Hepworth, 1990; Julkunen, 1996). While early pension policies and the consequent age-discrimination in the 1990s defined ‘older’ as younger (45+), the increased attention and reforms targeted to the ageing of population in the new millennium seem to be turning the definition again to higher ages, as suggested by the use of age 50 years by the OECD (2006) in a recent report. In promoting employment, EU has set a benchmark of achieving an employment rate of 50% in 2010 for older workers (defined as 55-64 years old) (Council of the EU, 2005).

Chronology-based age-definitions can be misleading and dangerous criterion as there are large individual and cultural variations in the social construction of age (Findsen, 2006). In a European perspective, being an older worker today seems on average somewhat younger than in the US, where working into higher ages, up to 65 years and beyond, is more common (EC, 2004). In a literature review from the US, Rocco et al. (2003) found out that the use of the concept ‘older worker’ varied within the age-range of 40-75 years. The review showed that defining an older worker as young as aged 40, was related to the formation of retirement decisions, the decline in training opportunities, the dispelling of myths about age and the ability to learn, and the need for older workers to stay on-the-job to mentor younger workers. Use of age-categories of 70 and 75 years were associated with pre-retirement involvement, being in demand because of their experience and gradual work reduction and training for alternative careers, suggesting that workers feel they should not still be working. Rocco et al. (2003) conclude that in defining an older worker, more important than biological or chronological age are life-history and concerns faced at different points in the life-span, and that there is a movement to more subjective definitions of age across the life-span (Buchmann, 1989).

ILO, however, in its Older worker recommendation (No 162) from 1980 (quoted in ILO, 2002, p. 1), which is still highly valid today, defined older workers without any particular age reference, as ‘those who are liable to encounter difficulties in employment and occupation because of advancement of age’. Finally, due to sociocultural factors and the double discrimination of ageism and sexism, the age to consider women as old is different from men in some countries (e.g. Baltic States) (Fortuny et al., 2003; ILO, 2002).
This paper suggests that from a lifelong learning perspective (Box 2) the two approaches should be understood as complementary, as two ends of the one continuum, rather than viewing them as contradictory. It is implicit in the lifelong learning perspective that learning and development needs do appear – or disappear – throughout the lifetime and in the context of one’s work history and career. ‘Older adults’ learning can be seen as part of the larger framework of opportunity open to individuals across the life course’ (Findsen, 2006, p. 68). Career theories tend to be optimistic about late career as a period of personal growth (Lahn, 2003). The results of the project Working life changes and training of older workers (Worktow) (Tikkanen et al., 2002) suggested that there is a need to be open towards multitude of trajectories, where the work performance (strengths and weaknesses) can vary not only between different (for example age-) groups of individuals, but also within the course of career at any age or point of time. In line with Ellström (1996), job performance and competence are viewed here as what people show, or put in use, in the context of the workplace and their individual life situation, rather than an objectively measurable entity, and therefore as drawing from, but not necessarily equal to, one’s potential.

**Box 2: What is lifelong learning?**

The European Commission Communication on lifelong learning defines it as ‘all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences within a personal, civic, social and/or employment-related perspective’ (EC, 2001, p. 33).

Lifelong learning is, therefore, about:

- acquiring and updating all kinds of abilities, interests, knowledge and qualifications from the pre-school years to post-retirement. It promotes the development of knowledge and competences that will enable each citizen to adapt to the knowledge-based society and actively participate in all spheres of social and economic life, taking more control of his or her future;

- valuing all forms of learning, including: formal learning, such as a degree course followed at university; non-formal learning, such as vocational skills acquired at the workplace; and informal learning, such as inter-generational learning, for example where parents learn to use ICT through their children, or learning how to play an instrument together with friends.

Cedefop definition of lifelong learning is ‘all learning activity undertaken throughout life, with the aim of improving knowledge, skills/competences and/or qualifications for personal, social and/or professional reasons’ (Tissot, 2004, p. 102).

A recent book on older workers and lifelong learning from Cedefop shows that even if lifelong learning is generally a concept widely agreed upon across countries and various cultures, some cross-cultural variation in understanding it does exist (Tikkanen, 2006). For example in Japan the concept is understood very widely, and as a broader one than in Europe (Ohsako and Sawano, 2006) and the same holds for China.
Overall the presentation here supports the message of a recent major Cedefop publication in this area, *Promoting lifelong learning for older workers: an international overview* (Tikkanen and Nyhan, 2006b). The book called for age-friendly working and lifelong learning practices through more holistic and active perspectives on how people can manage and negotiate their working life: ‘[...] society, work organisations and individuals must think of the ageing process as a lifelong developmental and learning process in which one can continuously learn to take on new life challenges taking one’s interests, opportunities and constraints into account. This means adopting a lifelong learning mindset, understanding learning as a broad, holistic concept encompassing individual education and training, but equally and perhaps more importantly also collective community and workplace learning. The adoption of ‘age-friendly’ working and lifelong learning practices is required in the interest of economic and social sustainability and personal well-being for all.’ (Tikkanen and Nyhan, 2006a, p. 10).

In this paper older workers are defined as those aged 45 years and above. This demarcation line is commonly used in the European discussion (Tikkanen and Nyhan, 2006a), as it tends to mark the starting point to age-discriminative practices in the labour market. However, depending on the source or country, the definition (e.g. age limit) of the group of older workers may differ.

1.2. **Thematic focus within the broad discussions on older workers and lifelong learning**

The title of this paper is a broad one, so we start by specifying the scope. Figure 1 illustrates how the focus will be at the intersection of the broad fields of lifelong learning and a life-course perspective to working life and careers. Within the lifelong learning discourse the main interest here will be in the adult education area and under it primarily in work-related learning. In other words, from the various contexts of lifelong learning, VET/CVET, work-related learning and professional development are covered here, while the two other contexts, general initial education and personal development (liberal adult education, *education permanente*) (Colardyn, 2001), fall outside the range of this paper. The lifelong learning agenda has been criticised – and for good reasons – for being dominated by economic and vocational concerns and for focusing on the issue of competitive workforce (Findsen, 2006, p. 67). Furthermore, it tends to be oriented to employer or consumer interests with little real interest in learning for democracy and community (Smith, 2001). Due to the context and the nature of this paper, it has been necessary to narrow the focus here.

However, we do acknowledge here that the borderline between work-related and non-work-related lifelong learning and competence needs has become more blurred, for workers of all age. This is due to the widened competence needs in working life and the demands for multi-skilling, including such areas as for example languages, information and communication technology (ICT) skills and various soft-skills related to service work and human interaction, among others. Particularly the basic ICT skills, required at work and viewed also essential for
learning to learn (EC, 2005), are increasingly overlapping with key citizenship competences more generally as recently defined by OECD (see DeSeCo: Rychen, 2003; Rychen and Salganic, 2003). The rapidly changing competence requirements in working life and, related to that, the changes in knowledge creation and valuation (Box 3) are calling for attention to the theme of older workers and lifelong learning. Other factors blurring the work versus non-work competence divide, relate to changes taking place in the world of work. Examples are the changing nature of work and employment contracts as well as of career patterns (e.g. using the increasing opportunities for telework, variable and ever-changing careers) (EC, 2004; Hall and Mirvis, 1995; Maurer, 2001). The skills (work and life skills) and attitudes of older workers in particularly are challenged by these changes.

Figure 1: The theme of older workers and lifelong learning at the intersection of lifelong learning, life-course and work careers

In his review of the history of retirement in Britain, Parker (1987) concluded that older workers – especially working class older people – have always been treated as a reserve of labour. It is not difficult to agree with his conclusions still today. To some extent, however,
their status in the labour force is a matter of how we define older age (Box 1) and an older worker (Findsen, 2006).

**Box 3: On defining job-competence**

The term ‘competence’ should be used cautiously as it can create confusion. It has been used in somewhat different meanings, sometimes even equalling learning and competence development, although always taking it more broadly than qualifications (Clematide, 2002; Høyrup and Pedersen, 2002). Compared to the broad northern European meaning and use, it is used in a much narrower sense in some countries, especially in the UK and Australia. The term is to be understood in accordance with the former meaning in this paper. European Commission uses a definition of ‘a combination of knowledge, skills and attitudes appropriate to a particular situation.’ (EC, 2005, p. 3).

The results of the Worktow-study (Tikkanen et al., 2002) showed that while employers do value certain aspects of the older workers’ job-competence, they at the same time tend to point to its shortcomings, even if competence is rarely measured with any systematic but rather judged by intuition. In SMEs in Finland the workers themselves found it easier to define the competence of their co-workers than their own, and that, besides managing their own job tasks, employees used various environmental clues, such as feedback from supervisors and management as well as from co-workers. ‘Competence was viewed as complex, dynamic, and temporal in terms of capability and external demand for it. This complexity extended beyond one’s own job tasks and areas of responsibility and acknowledged various levels of competence: individual, social or collective, job tasks and company level activity involving a company’s external relations. Thus, being aware of one’s own competence and its strengths and limitations, was only one aspect of a broad view of competence. […] it was just as important to be aware of the competence of one’s co-workers. An important part of one’s broad, total competence was knowledge of the workplace and work organisation in the sense of what kind of material, social and cultural resources were available there. Temporality in competence was mainly related to project type of work among engineers. Thus a person could be defined “competent” at one time, but “not competent” at another, for example, when there is no demand for one’s competence (a).’ (Tikkanen, 2002, p. 70).

(*) In a larger scale this is what happened to older workers towards the end of the 1990s. Whereas they had been highly valued competent workers just a while ago, change of skill demands in working resulted in defining them as less competent than the IT-skilled younger workers.

As Figure 1 roughly illustrates, however, taking the 45+ perspective to older workers poses a challenge to the marginality view, proportionally (relative to the lifespan and total population) and in absolute numbers. Indeed, their volume is significant and expected still to grow for a few decades as the baby boomers are ageing. In terms of time-perspective we are talking here of no less than around 20 years’ period within the total working life period (career). Within
the next decade industrialised societies will experience a major demographic shift, which is bound to make older workers more visible in the workplaces as younger generations are simultaneously diminishing. A comprehensive recent overview over the statistics concerning the demographic change and older workers is provided in Descy (2006). The figures below show a rough characterisation of the situation:

(a) older workers aged 45-64 years represent 25% of the total working population, both in the EU-25 and EU-15, as well as in the US, while in Japan their share is even higher, 28% (Descy, 2006);

(b) in the US the workers aged 40+ represent currently 48% of all workers, and their share is anticipated to further increase to 51.8% in 2010 (Mosner et al., 2003), while the proportion of the 55+ workers will increase from 12.9% to 16.9% (Ford and Orel, 2005);

(c) aging workforce (40+) of information workers (workplace computing and Internet users in comparison to workers who rely only on standard desktop computers) accounts for nearly one-third of the entire US workforce (44 million workers) (Mosner et al., 2003);

(d) the average exit age from the labour market was 60.7 years in EU-25, 61 years in EU-15 and 58.8 years (60.3 among men and 57.6 among women) in the new Member States in 2004 (EC, 2006c);

(e) The population aged 65+ represent 16.4% of the total population in EU-25, 17% in the EU-15, and 13.6% in the new Member States in 2004 (Eurostat, 2007);

(f) on average men aged 60 years can expect to live for another 14-15 years in the US and EU-25, close to 17 in developed industrialised countries and to 18 in Japan, while these figures for women are even higher, 20-24 years (Ilmarinen, 2006).

There will be significant changes in these figures in the coming decades. By 2050:

(a) EU-25 working age population is expected to decrease by 52 million (Eurostat, 2005) while population aged 65+ expected to double (compared to 1995 situation) (EC, 2006b);

(b) the population aged 65+ is estimated to increase to 29.9% of the total population in EU-25, to 30% in the EU-15, and 29.1% in the new Member States in 2004 (Eurostat, 2007);

(c) United Nation’s estimations show that population over 60 years of age will account for 33% of the entire population in developed regions (such as Japan, the EU and the US) against 20% in less developed countries (Ilmarinen, 2006);

(d) life expectancy will further increase, in EU-25 to 80.5 years for men and 85.6 years for women (EC, 2006b). This trend is generally considered as an achievement, but it poses both significant opportunities and challenges for EU Member States. The focus in the discussion so far has been on the challenges and threats side, while the view to opportunities has only recently started to emerge.

It has been estimated that as a result of these trends, in the next 15 to 20 years, employers will be hiring one out of four workers older than the age of 55 years (against one every five workers hired presently) (Goldberg, 2000 quoted in Ford and Orel, 2005).
In 2006 the employment rate averages for EU-27, EU-25 and EU-15 were respectively 43.5%, 43.6% and 45.3% in the age group 55-64 years (women 34.8%, 34.9% and 36.8%; men 52.6%, 52.8% and 54.1% correspondingly), varying between countries from a high 69.6% in Sweden to a low 28.1% in Poland (Eurostat, 2007). In the age groups 60-64 years and 65-69 years the rates were respectively 26.7% and 8.2% in 2005 for the EU25, varying from 12.7% and 2.4% in Slovakia to 56.8% and 14.6% in Sweden (Eurostat, 2006). In comparison, on average older workers tend to work longer in the US and Japan. In the latter, 7 out of 10 are and in the latter less than 6 out of 10 are still in the labour force in the age group 60-64 years (Rix, 2005).

There is a need to find measures to increase in particular older women’s employment, as the employment gender gap is largest among the low educated, often older workers (EC, 2006c). Increasing the level of education through lifelong learning is considered as one of the most important measures to this end, as the higher educated have significantly higher employment rates than those with low education. EU-25 employment statistics from 2004 show that in the age group 55-64 years employment levels were double as high among higher educated (62.4%) compared to those with only elementary level of education (31.7%) and that education can have a strong effect in particular on older women’s employment levels (55.9% versus 23.4% respectively in the same age group) (Ilmarinen, 2006).

1.3. Literature basis and structure of the paper

This paper builds on a review of existing literature within the theme of older workers and lifelong learning. All in all, however, research with this particular perspective is still embryonic and there is little systematic knowledge available. A recent literature review from the US showed that most publications in this area come from professional journals rather than research literature (Rocco et al., 2003). Some relatively recent surveys give perspective to the participation rates in formal learning opportunities. Beyond these, however, we know little about this type of training provision. Therefore, while formal learning opportunities within VET and CVET are discussed to the extent literature available allows it, this account on lifelong learning of and for older workers is largely drawing from informal (1) learning in the workplace context. When it comes to informal learning and human resources development in Europe, some surveys have been carried out. However, reports from these tend to give limited information about older workers’ perspective specifically. Furthermore, when age-related

(1) The survey (2003 ad hoc module on LLL in the LFS) identified four non exclusive forms of informal learning:
(a) self studying by making use of printed material (e.g. professional books, magazines and the like);
(b) computer based learning/training; online internet based web education;
(c) studying by making use of educational broadcasting or offline computer based material (audio or videotapes);
(d) visiting facilities aimed at transmitting educational content (library, learning centres etc.)
(Kailis and Pilos, 2005).
results have been reported, differences in methodological choices (e.g. use of different age-categories and definitions of participation (\(^2\)) complicate building of a coherent picture.

However, some literature has started to emerge. Three European and wider international, learning-focused larger studies on older workers provide the main background for this presentation: the Cedefop report *Promoting lifelong learning for older workers: an international overview* (Tikkanen and Nyhan, 2006b), TSER\(^3\)/EU-project *Working life changes and training of older workers* (Tikkanen et al., 2002) and a thesis *Learning and education of older workers: lifelong learning at the margin* (Tikkanen, 1998). Other major sources used are some recent general overviews to the situation of older workers in working life and labour markets (e.g. Buck and Dworschak, 2003a; Ilmarinen, 2006; ILO, 2002; 2003; OECD, 2006). Finally, some main sources have been also used from outside Europe, such as the comprehensive literature-based study by Rocco et al. (2003) on HRD and older workers in the US, statistics-based overview to older workers’ situation in Australia (Karmel and Woods, 2004), and a HRD-study on older workers in New Zealand (Gray and McGregor, 2003).

There is some research targeted to older workers also in areas which fall under the broad umbrella of lifelong learning, although have different disciplinary background. Drawing from the management sciences and economics the review includes also the perspective of late professional and career development (e.g. Boerlijst, 1994; van der Heijden, 1998).

By necessity, the approach to the theme of older workers and lifelong learning is a cross-disciplinary one. Older workers and lifelong learning will be discussed on organisational and societal levels, and on an individual level to the extent literature available allows it. Some attention will be paid to the borderlines between working life and other life spheres, and how these may have had an impact on older workers and their lifelong learning. To some extent the paper will also address the developmental trends in this area.

The rest of this paper is divided into four sections. Section 2 takes a brief overview to the socioeconomic and pedagogic background of the discussion on older workers and lifelong learning, with some remarks also on how it has developed over the last decades. Promoting active ageing and other perspectives are highlighted. Section 3 describes learning participation among older workers mainly in the light of existing surveys. Section 4 covers formal and informal learning activities as well as the HRD perspective. This presentation is followed by a brief assessment of the research and discussion on older workers and lifelong learning. To some extent also the practice of lifelong learning is touched upon from the point of view of older learners (Section 5). The final section will draw some conclusions and make recommendations regarding the research, policy and practice of lifelong learning of and for older workers.

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\(^2\) Referring to Courtney (1989, p. 15), Smith (1998) has pointed out that adult education, continuing education, lifelong learning, independent learning projects, community education, community development, adult learning, andragogy, adult basic education, facilitation, conscientisation are concepts which have been used with more or less in the same meaning.

\(^3\) TSER = Targeted socioeconomic research.
2. Lifelong learning to promote active ageing: development of the discussion

There are two separate, but partly parallel developed discourses, which form the background to the theme of older workers and lifelong learning, one on older workers and the other on lifelong learning (Tikkanen, 2006). On one hand, while older workers have been widely discussed in research and policy, this discussion has not dealt with learning-related aspects. As a rule, however, various policy documents point out to the importance lifelong learning. On the other hand, lifelong learning has been a rapidly growing topic in the educational policy agenda (4). In this area, too – including the research areas previously defined as adult education and HRD – there is literature in abundance, as indicated for example by the Lifelong learning bibliography (Cedefop, 2004). However, the discussion has paid very little attention specifically to older workers (5), or older people more generally. This is particularly true in the area of work-related learning.

This section will briefly describe these two lines of discussions by reviewing perspectives to active ageing – an ultimate goal to promote lifelong learning. A more comprehensive account is available in Tikkanen (2006). The sections below cover the policy discussion, the organisational or workplace perspective, and the learning and training perspective. To some extent also the development of these two lines of discussions are being reviewed.

If we look at the situation of older workers in working life in a historical perspective, the following four different periods can be separated:

(a) work as the option, retirement as a crisis;
(b) early exit from labour;
(c) exit from early retirement;
(d) towards active ageing and an ageless society.

This development provides the background against which to understand the lifelong learning discussion, whether it comes to the older workers themselves and their attitudes, or the employers/workplaces and the training providers. Each of the four phases is briefly described below.

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(4) See Cedefop’s list of selected milestones in the evolution of the European area of lifelong learning. available from Internet: http://www.trainingvillage.gr/etv/Projects_Networks/LLL/ [cited 1.8.2007].

(5) The Cedefop VET-Bib database, which was launched in 1985, provides comprehensive coverage of European literature on developing VET including mainly monographs, journal articles and some grey literature (updated monthly). This database included five references of high relevance to older workers (Annex 1).
2.1. Work good, retirement bad: learning for alleviation of the retirement crisis

The situation and status of the segment of the workforce defined as older workers in society and in workplaces, have been affected by major political decisions of socioeconomical nature, but also by educational development. During the last couple of decades a great deal of attention has been paid to older workers by policy-makers and researchers. Historically speaking, there are both similarities and differences in the perspectives raised compared with the situation of older workers today, also in terms of their job-competence. Parker (1987) draws our attention to a historical study by Stearns (1977) who stated that ‘between 1890-1919, older workers were being threatened by the obsolescence of their skills and by work speed-up. British metal workers claimed that the latter caused premature ageing, and found that many of their employers judged them “too old at forty” ’ (Parker, 1987, p. 79). In terms of their social status and value of their contribution in working life, at least for the older workers in non-managerial positions, the description matches only too well to their situation still today (Tikkanen and Nyhan, 2006a).

Until the 1980s educational level generally was significantly lower and adult education policy and practice much less developed than today. The same holds for social policy and pension systems. The extent of professionalism in working life was less developed than today. The job-competence of older worker, too, was less put under a question. Rather, older workers were generally considered as mature in a positive sense of the term. Although there is no comparative research on the topic, looking at the discussion today and that of still a couple of decades ago, one cannot avoid the impression that being an older worker was also to be respected to a greater extent than what seems to the case today.

Not surprisingly then, the early discussion within sociological research from the 1950s until the beginning of the 1980s was largely focused on the crisis and shock of adjusting to retirement (Phillipson, 1987). There was little educational provision targeted to older workers. Also the research on HRD was focused on preretirement and retirement issues (Rocco et al., 2003). Furthermore, as pointed out by Manheimer (2005), the educational programmes that existed for older learners, emphasised the crisis of adjustment to retirement (Peterson, 1983) and represented the social service model of older adult education (Moody, 1985). Also researchers showed less interest in this segment of the workforce, presumably due to the positive or taken-for-granted flavour attached these years. That, however, changed as the long- and short-term unintended and unforeseen effects of the early retirement schemes came about, and there was an awakening in regards to the short-sightedness and non-sustainability of these schemes.
2.2. Early exit from labour: lifelong learning not an issue

The 1980s changed the tune to finding ways for older workers out of working life and marking the decade of early pension policies (Sheppard, 1990). Both push and pull was put in play. Pull was created by attractive private pension systems and public welfare provisions, whereas pull came about as employers quickly adopted these options to shed older employees out (Ebbinghaus, 2006). The latter was particularly welcomed option in the economic recession years of the early 1990s in many countries in Europe. Behind the early pension policies was a kind of inter-generational deal to make room for younger workers at a time of high unemployment. It failed, however, as employers made a good deal of older workers redundant but did not replace them by younger workers. Consequences of this practice are to be seen in workplaces today in the special camel-curved personnel age-profiles (many older and younger workers but less from in between).

Retirement became both a new social institution as well as a historically new period in an individual life-course. Manheimer (2005) has described this period by referring Lashlett’s (1991) definition of the four ages of a man. The core of Lashlett’s thinking – ’a fresh map of life’ – was that new period of retirement represented an addition, a fourth age to the earlier tri-partite conceptualisation of a human life-span. The conceptualisation of this new third age naturally also meant a postponement and a new definition of old age, now the fourth age. The new life-stage marked an evolvement of a new concept of a mature adult, which was at the same time free and compelled to develop a new identity and new roles for themselves. Some were thrilled by the new freedom, many depressed by the involuntary exclusion. Consequently, new meanings and functions were also attached to learning activities, on the side of expanding training provision. The following description by Manheimer (2005) illustrates how this development evolved in a complex societal fabrication and interplay of various perspectives, preparing, by necessity, for an increasingly interdisciplinary discourse and cross-administrative concern for mature adults in the 1990s and onwards.

‘Although these relationships between changing attitudes, rationales for older learner programs, and parallel changes in legislation were occurring, so were the health and economic conditions of older persons. The 1980s ushered in the concept of the third age [...], a term meant to capture the fact that for the first time in history there was a large group of adults whose existence was defined neither by work nor illness but by opportunity to use discretionary time and money [...]. In postindustrial societies across the world, people were living longer, healthier, and economically more secure lives, usually thanks to public provision of social welfare programs such as private and state-funded pensions plans and national health care insurance (Medicare and Medicaid, in the United States). Yet this amazing achievement eventually led to a debate over the roles and entitlements of mature adults. This dispute surfaced in a new set of relationships between aging theory, educational rationales, and social policies.’ (Manheimer, 2005, p. 205-206).

From this time onwards, besides health and job competence, the changes in retirement pathways, in the image of retirement and of retirees and, consequently, in the retirement life-
styles, became factors influencing on the older workers’ negotiations of their individual life-
projects, and, indeed, their willingness to learn and continue in working life. To a notable
extent, the trend has become strengthened since. Studies from the US show that learning
perspective to older workers in the 1970 was narrow, focusing on training techniques that
managers could apply with their older workers (Rocco et al., 2003). Yet, it seems that interest
in this area was more pronounced in the US than in Europe at that time.

It was against this background that the discussion on older workers took a new turn the 1990s.
On the policy agenda the challenge has been how to keep the older workers in the working
life until the statutory retirement age. On the individual agenda, the new pathways opened
new options and possibilities, but also new threats for older workers. Parallel to these
developments, the pace of changes in working life was picking up and the need for continuous
learning was becoming increasingly obvious.

2.3. Exit from retirement: the rhetoric of lifelong learning emerges

Since the early 1990s the concern for the socioeconomic consequences of the trends of
population and workforce ageing as well as that of early labour exit trend (Ebbinghaus, 2006),
has made older workers one of the key issues in the social and employment policy discussion
in Europe and other parts of the industrialised world. The goal has been to increase the actual
age of retirement, which in several countries decreased to below 60 years towards the end of
the 1990s. The measures adopted to these ends have varied between and within countries, as
well as from one workplace to another. Some countries have initiated major measures,
including pension reforms. Besides changes in pension and employment policies, the early
measures took largely the issue of occupational health as a starting point, although some
training programmes were also offered (Crown, 1991) to increase older workers’ ability and
willingness to work longer. The rationale was that older workers in good health and capable
to work were also willing to work longer. While this indeed often was the case, as a general
rule, work ability did not always guarantee motivation – and, naturally, had even less to do
with opportunities for continuing in working life.

Examples of countries, which have initiated major governmental measures, are Australia,
Austria, Denmark, Finland, Germany, Ireland, Japan, Korea, Luxembourg, the Netherlands,
Norway, the UK and the US (OECD, 2006) (6). However, launching these reforms has not
been plain sailing, as Ebbinghaus (2006) has shown in his overview covering the
developments in Europe, Japan and the US. The multiple early exit pathways become quickly
entrenched, putting the social partners in ‘status quo defence’, particularly as benefits came to
be viewed as acquired rights (Ebbinghaus, 2006). A review of these reforms by the OECD

(6) For interested readers, there are extensive European and international overviews available to these (e.g.
(2006) has recognised the actions taken and progress made, but also pointed out to their shortcomings and the need for intensified measures of both structural and organisational nature.

The 1990s brought also to some extent the concern for older workers competence in attention as one factor in the complex total picture, as well as underlined the importance of the organisational perspective (Ilmarinen, 2006). The policies towards older workers in the 1990s, however, reflected an instrumental-objective concern for older workers, with a top-down approach to finding measures and solutions on how to keep older workers in by changing the regulative framework and by investing in health. Learning and competence development were part of the rhetoric but in rare cases the practice. Increased motivation to work from older workers’ side was assumed to follow from these measures.

2.4. Towards an active ageing and an ageless society with lifelong learning?

More recent policy development and approach to the issue of ageing in working life shows signs towards a more holistic approach to the concern for older workers (Ilmarinen, 2006). The key message raised is the promotion of active ageing in working life and beyond, which further supports the more general goal of active citizenship. Measures are now sought to extend older workers’ contribution to working life in line with the increased life-expectancy. Lifelong learning is seen as one of the crucial means to these ends. The more comprehensive approach seeks to integrate the three perspectives of having the ability (health, competence), the opportunity and being willing (motivated) to work longer and remain an active citizen throughout one's lifespan. Besides pension reforms, in the new millennium attention has in particular turned to workplaces and initiatives and measures there to provide real options and conditions for extended careers.

‘The policy of active ageing in the European Union is about tightening early retirement systems and improving work benefits. The right and necessity of lifelong learning, good work conditions, flexible working life, and accessibility to health and social services are also emphasized. Work incentives must be developed so that they offer true options for people to continue work.’ (Ilmarinen, 2006, p. 50)

For the EU-25, active ageing and reaching the goals for 2010 as defined in the Lisbon strategy, still pose a significant challenge. Ilmarinen has recently pointed out how for ‘approximately half of the new Member States and about 80% of the new workforce, active ageing is an unknown concept and a very distant goal’ (Ilmarinen, 2006, p. 51).

In the Nordic countries the development of a more comprehensive concern for the older workers has been taking place under a more general concern for the workplace wellbeing (Ilmarinen, 2006; Tikkanen, 2006). However, there is some variation between countries in the perspectives the wellbeing is sought for older workers. For example, Finland has been
working under the conceptualisation of work ability and promoting age-management as a part of it, while Norway has promoted the framework of an inclusive working life to find win-win solutions in a dialogue between employers and employees, the need for this being accentuated by the high and still increasing sick-leave rates as well as labour shortage. The focus of the discussion has also broadened significantly through the policy and practice of lifelong learning, which is reflected in the generally high participation rates in learning activities in Northern Europe (Section 3). Job-competence, competence development and learning needs of older workers are increasingly receiving attention within the overall concern for older workers. As more generally in Europe, the latter development is taking place alongside the diminishing trend of younger age cohorts and their different competence, interests and preferences in regards working life compared to older generations. It seems that a more ‘organic’, bottoms-up concern for older workers is emerging on the side of the instrumental approach characterising the previous phase described above.

Indeed, also more generally the pressing demographic development and due concerns in working life have marked the new millennium with a paradigm shift in the ageing policies and practice in workplaces and in society. The failure model seems to be losing grounds relatively speaking, as the more optimistic, successful or productive outlook on aging is emerging (Manheimer, 2005). For older workers, the new mindsets and realities with increasing flexibility in regards work, retirement and learning (Nyhan, 2006) could mean the gradual disappearance of the work-retirement divide. The workplace can become a dynamic space for older workers rather than ‘a unidirectional journey landing to retirement’ with multiple exits and entries and increased individual choice (Rocco et al., 2003). Rocco et al. (2003, p. 155) have conceptualised the emerging ‘workspace as a field of interacting forces in which the older workers’ decisions to remain, return, retire, or renew the work contract is moderated by organisational decisions to retain, retrain, recruit or redesign the work contract for older workers’. To resourceful older people lifelong learning then has potential to add to their life-choices and to empowerment. That further allows for facing up to an increasing range of biographical options (Olesen, 2006). This development is marking the evolvement of a new, more resourceful type of older people, neo-elderly (7), suggesting that an age-irrelevant (Neugarten, 1982) or an ageless society (Manheimer, 2005) is emerging as still another dimension in the discussion of knowledge society as a greying society (Hake, 2006).

However, these visions are not without their critics. It has been pointed out how the future of lifelong learning opportunities could increasingly become a function of the marketplace, which only can be utilised by those older workers in sufficiently good health and motivated by their prior positive experiences in and from their prior education (Manheimer, 2005). Although this perspective is supportive when it comes to older learners’ options for learning, the differences in material and social conditions cause inequality in learning opportunities for

(7) With this concept Manheimer refers to ‘a new stereotype of the robust, engaged, thriving senior adult’ which has ‘eclipsed the earlier stereotype of the despondent, dependent, disengaged older person’ (Manheimer, 2005; p. 206).
different subgroups of older learners (Findsen, 2006). Indeed, there are some internal contradictions and tensions in the discussion of lifelong learning (Edwards et al., 1995) – perhaps particularly pronounced in the case of (low-educated) older workers and other marginal groups. On one hand, the notion of lifelong learning as such, and as a basic human activity and as facilitating development, is generally accepted and agreed upon. It has potential to opening for and promoting new learning freedom, visions, options and outcomes for individual choices in working life and beyond. On the other hand, and at the same time, it has created new and powerful inequalities with strong issues around access to knowledge and individualisation (Smith, 2001).

Box 4: Towards coherent and comprehensive lifelong learning strategies: six essential elements defined by the European Commission

- partnership working, not only between decision-making levels but also between public authorities and education service providers, the business sector and the social partners, local associations, vocational guidance services, research centres, etc.;
- insight into the demand for learning in the knowledge-based society – which will entail redefining basic skills, to include for instance the new ICT. Analyses should take into account foreseeable labour market trends;
- adequate resourcing, involving a substantial increase in public and private investment in learning. This does not only imply substantially increasing public budgets, but also ensuring the effective allocation of existing resources and encouraging new forms of investment. Investment in human capital is important at all points in the economic cycle; skills gaps and shortages can certainly co-exist with unemployment;
- facilitating access to learning opportunities by making them more visible, introducing new provision and removing obstacles to access, for example through the creation of more local learning centres. Special efforts are necessary in this context for different groups such as ethnic minorities, people with disabilities or people living in rural areas;
- creating a learning culture by giving learning a higher profile, both in terms of image and by providing incentives for the people most reticent to opt for learning;
- striving for excellence through the introduction of quality control and indicators to measure progress. In concrete terms, provision must be made for standards, guidelines and mechanisms whereby achievements can be recognised and rewarded.


Generally speaking, from the perspective of older workers, the development of educational policies and systems and the work done to promote the practice of lifelong learning, have been slow in reacting to their situation and learning needs. Indeed, the challenge is still to truly recognise them as a new group of learners. The new millennium, however, has marked
significant progress in the lifelong learning policy formulations of the EU (Descy, 2006; Nyhan, 2006). Policy guidelines have also been formulated by the OECD, EU, ILO, and Unesco. The G8 countries have underlined the importance of lifelong learning for everyone in the new economies of the knowledge age and it is also seen as one of the main strategies to combat unemployment. The EU Lisbon goals set in 2000 shifted the development of the EU policies and practice to a new gear. However, the degree to which the Member States have formulated their educational policies and practice to realise these goals varies considerably as shown by the survey *National actions to implement lifelong learning in Europe* (Cedefop and Eurydice, 2001). By 2006 the Member States are expected to have developed and implemented coherent and comprehensive lifelong learning strategies as specified in the *Education and training 2010 report*. To this end the European Commission (EC, 2001) has defined six key elements, which are shown in Box 4. This task is being supported by Cedefop (2004).

Furthermore, bringing lifelong learning in the workplaces, to the benefit of older workers, shown to be a slow process, even no process in many workplaces, as will be discussed later in this paper.
3. Participation of older workers in lifelong learning

Development of abilities and skills through continuing vocational training at work has become an essential part of lifelong learning, and reflects the emphasis enterprises place on the qualifications of their staff (Eurostat, 2007). The Commission follow-up report to the Lisbon strategy comments how the process towards the European benchmark of 12.5% participation rate is slow (Box 5) and how increasing participation rates among adults still is a challenge (EC, 2006a). One of the recent main messages on participation of adults in lifelong learning by the European Commission’s progress report towards the Lisbon goals (EC, 2006a) was how the efforts to increase participation should especially focus on low educated, participation of older age groups in education and training as well as on the regional dimension. This would mean to genuinely also widening the participation in lifelong learning, which has been a challenge since the 1980s. Older workers, representing the low-educated and hard-to-reach groups (Uden, 1996), are a particularly central for the widening discussion. Both the current situation and the developmental trends vary a lot between the EU-25 countries (Table A1 in Annex 2).

Box 5: Four million more adults would participate in lifelong learning within any four week period in 2010 if the EU benchmark of 12.5% participation rate was achieved.

‘Individuals must update and complement their knowledge, competences and skills throughout life through participation in lifelong learning. The rate of adult participation in education and training in 2005 reached 10.8% in the EU, i.e. 2.9 percentage points higher than in 2000. A part of the increase was, however, due to breaks in time series, mainly in 2003. After and before 2003 progress was only slow. The objective set by the Council of achieving a 12.5% rate of adult participation requires Member States to step up efforts and to develop an integrated, coherent and inclusive lifelong learning strategy. Best performing EU countries are: Sweden (34.7%), the United Kingdom (29.1%) and Denmark (27.6%).’ (EC, 2006a, p. 5-6) In fact, all of these three countries were already well above the benchmark in 2000, together with Finland and the Netherlands).

The following is a summary of the major issues concerning older workers and learners’ participation in lifelong learning:

(a) participation rates decline by age and older workers participate less than their younger counterparts. This finding has been consistent across various surveys. The findings show there is unequal access to education (Findsen, 2006) and that lifelong learning is not a reality for older workers (Descy, 2006). Besides differences in initial educational, poor health and inconsistent work opportunities in the labour market mean inequality in access to learning in- and outside workplaces (Findsen, 2006). These findings, however, are
based on cross-sectional surveys and there is little knowledge available from the same persons over time;

(b) older workers have still relatively low level of education in comparison with younger age groups. While about one out of four in the age group of 30-34 years have a low level of education (according to the Unesco international standard classification of education: at highest lower secondary education), in the age group 45-49 years this is the situation for a third, and in the age group 60-64 years for half of the persons belonging to this group (Descy, 2006);

(c) participation in lifelong learning accumulates (Tuckett and Sargent 1996; Tuijnman, 1989), meaning that participation rates are higher among higher educated older workers. The finding is consistent throughout industrialised societies (Colardyn, 2001). However, critics have been pointed to the methodological problems in producing statistical realities like the age-participation relationship, which is based on bivariate methods (Tikkanen, 1998). Multivariate approaches actually give a more realistic picture, showing that education and age have an interaction effect. Among higher educated participation rates have been found to be high regardless of age (until close to 60 years), while the rates for low-educated are low also in younger age groups (Tikkanen, 1998). The European statistics show that high educated people participate seven times more in lifelong learning than low educated, and participation decreases after the age of 34 (EC, 2006a, p. 36). The recent increase in educational participation in Europe, drawing largely from the Lisbon strategy, seems persistently to confirm this bias (Table A2 in Annex 2). Thus, it has been pointed out that rather than age, the issues behind the low participation rates among low educated older adults is, in Bourdieu’s terms, their lack of sociocultural capital (Findsen, 2006) and/or that their conditions in working life and beyond do not support participation in continuing education and training (Gallenberger, 2002 quoted in Reday-Mulvey, 2005);

(d) there is also evidence of cumulative disadvantages (Dannefer, 2003) faced by some groups of older workers with low levels of education, low participation rates and low interest in learning (Descy, 2006). Besides disadvantages, the accumulation of negative experiences – related to training or one’s beliefs about one’s learning ability or trainability – may lead to the erosion of power and loss of trust (self-efficacy, Maurer, 2001), and also to non-participation, as life-history studies have shown (Antikainen, 2005);

(e) there is little difference in the participation patterns of older adults in formal education from younger cohorts. Studies from all over the globe have demonstrated differential opportunity for groups of adults according to socioeconomic status, class, gender, ethnicity, and geographical location (Findsen, 2006, p. 70);

(f) older people prefer learning in informal and non-formal settings over formal settings (Descy, 2006). This holds for lifelong learning more generally (Kailis and Pilos, 2005). However, Descy (2006) has concluded that even if older workers prefer learning in
informal settings, there is still a great need for learning and competence development within the formal education system;

(g) in most countries the provision of formal learning still largely reflects the world of youth and higher education. It is being structured around opportunities for younger generations and, as typical in youth education, assumes a paternalistic stance of ‘we know what’s best for you’ (Findsen, 2006). Findsen argues that although existing research has expanded the meaning of adult learning participation, the conceptualisation of learning has been too rigid, adult education still has ‘Cinderella status’ in most countries, and lifelong learning is emerging as the dominant concept – ‘arguably a positive step’. Against this view the acknowledgement of informal learning and workplaces as sites for learning, is expanding our horizons into a more holistic perspective to the world of learning. Furthermore, while younger adults tend to have a taken-for-granted approach to the provision of learning opportunities, older learners appear as critical, ‘no-nonsense’ consumers of these services. The latter approach holds to the personal meaning of learning, learning contents, methods, as well as to learning outcomes. As such, older workers can pose a challenge to the needs of adult educators to ‘justify themselves as experts’ (Findsen, 2006), particularly against their long-established experiential knowledge;

(h) old workers’ participation in learning activities varies widely across countries (Kailis and Pilos, 2005). Participation rates are highest in the Northern European countries (Eurostat, 2007; Tuijnman and Hellström, 2001).

The rest of this section describes some of these perspectives further in the light of existing research and discussion.

3.1. Participation rates in lifelong learning

3.1.1. Overall learning participation

Participation in organised learning activities among the older learners is generally low and below that among younger workers. However, participation in formal learning activities has overall a very low priority among adult population, even if four out of ten has participated in some form of learning (Kailis and Pilos, 2005). The results from the Eurobarometer survey on lifelong learning 2003 showed a decline in participation rates by age. While a half of the youngest age group (25-34 years) had participated, the rates for the age groups 45-54 years, and 55-64 years were 40% and 30%, respectively (Kailis and Pilos, 2005). This is in strong contrasts to the needs for competence building in working life (Descy, 2006). This point is further accentuated by the fact that most of the EU-25 citizens (58%) had not participated in any learning activity during the 12-months period prior to the survey (Kailis and Pilos, 2005).
Country wise participation rates among older learners (Figure 2) tend to be highest in the countries where participation generally is higher (Table A1 in Annex 2). Table A1 (in Annex 2) shows the overall participation rates in Europe in lifelong learning, while Figure 2 is a detailed presentation of the participation rates by age groups in 2003 in EU-25.
Figure 2: Distribution of participation in lifelong learning by age groups, 2003, EU-25

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<td>1.8%</td>
<td>0.9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>2.9%</td>
<td>1.1%</td>
<td>1.0%</td>
<td>0.8%</td>
<td>0.6%</td>
<td>0.5%</td>
<td>0.3%</td>
</tr>
<tr>
<td>DK</td>
<td>2.4%</td>
<td>1.1%</td>
<td>1.0%</td>
<td>0.8%</td>
<td>0.6%</td>
<td>0.5%</td>
<td>0.4%</td>
</tr>
<tr>
<td>CZ</td>
<td>1.8%</td>
<td>1.0%</td>
<td>0.9%</td>
<td>0.7%</td>
<td>0.6%</td>
<td>0.5%</td>
<td>0.4%</td>
</tr>
<tr>
<td>B</td>
<td>1.9%</td>
<td>1.7%</td>
<td>1.5%</td>
<td>1.5%</td>
<td>1.3%</td>
<td>0.8%</td>
<td>0.5%</td>
</tr>
<tr>
<td>EU25</td>
<td>2.7%</td>
<td>1.7%</td>
<td>1.5%</td>
<td>1.3%</td>
<td>1.1%</td>
<td>0.8%</td>
<td>0.6%</td>
</tr>
</tbody>
</table>

Source: Adopted from Descy (2006).
NB: Data not reliable enough to be published for some age groups in the following countries: Estonia, Lithuania, Malta, Portugal.
Descy’s (2006) overview of older workers’ participation in lifelong learning shows that, first and overall, the statistics confirm that the two themes focus in this article – ageing workforce and lifelong learning – are still separated. The increase in the absolute and proportional number of people in the age-group 45+ is not matched by an equivalent increase in participation in learning. The various surveys consistently point out how older adults’ participation in education is not commensurate with their proportion of the population (Descy, 2006; Findsen, 2006; Tuckett and McAuley, 2005). Descy’s main message is that lifelong learning is not a reality for most older workers.

3.1.2. Participation in informal learning

Various studies indicate that a substantial amount of learning takes place outside of formal education provision (Smith, 1998). There are various perspectives and rationale to informal learning (for definitions of various forms of learning; see footnote 7). One perspective relates informal learning activities to learning culture. To promote and recognise learning in everyday contexts, in workplaces and elsewhere, one needs to promote the creation of learning culture, the development of a learning society (Antikainen, 2001). From a human development perspective participation in this kind of self-teaching (Tough, 1967 quoted in Smith, 1998 and Findsen, 2006) or self-directed learning (Knowles, 1975) indicates that adults have a sound range of abilities for planning and guiding their learning (Smith, 1998) and that learning can occur outside of education contexts and without experts to frame it (Findsen, 2006, p. 71-72). Generally speaking, this line of work has broadened the ideas of what constitutes participation for adults (Findsen, 2006). Informal and non-formal learning have been equated with greater autonomy, self-directedness, and learner control of knowledge construction (Jarvis, 2001). Box 6 shows how one of the pioneers of this line of thinking, Knowles’ (1975) has rationalised for self-directed learning by increasing maturity. Findsen (2006) has argued that although this perspective is supportive when it comes to older learners’ options for learning, the differences in material and social conditions cause inequality in non-formal and informal learning opportunities for different subgroups of older learners, not least between men and women due to intersecting of ageing and gender.

Quantification of the learning activities, which take place outside the formal training settings, is not an easy task. There is substantial variation in the definitions for informal and non-formal learning – as there can be for formal participation (EC, 2006a). There is particularly little knowledge available of older workers’ participation in informal learning. However, older learners – like adult learners in general – have preference for informal learning contexts (Tikkanen et al., 2002; Paloniemi, 2006). With this starting point, this section will review some studies on adult population in general.
Knowles puts forward three immediate reasons for self-directed learning:

- there is convincing evidence that people who take the initiative in learning (proactive learners) learn more things, and learn better, than do people who sit at the feet of teachers passively waiting to be taught (reactive learners). ‘They enter into learning more purposefully and with greater motivation. They also tend to retain and make use of what they learn better and longer than do the reactive learners’;

- self-directed learning is more in tune with our natural processes of psychological development. ‘An essential aspect of maturing is developing the ability to take increasing responsibility for our own lives – to become increasingly self-directed’;

- many of the new developments in education put a heavy responsibility on the learners to take a good deal of initiative in their own learning. ‘Students entering into these programs without having learned the skills of self-directed inquiry will experience anxiety, frustration, and often failure, and so will their teachers’.


Furthermore, participation in informal learning is particularly high in countries where also participation in formal learning is high (the Nordic countries, Austria, Slovenia and the UK). This finding speaks on behalf of differences in learning attitudes and culture on national level. It could also be an indication of the various degrees or extent of the development of learning societies within Europe. There is no systematic, cross-national comparative data available in regards older workers, but there are indications that also older learners benefit from a strong learning culture. Research findings in this line are, first, the internationally high participation rates reported for older workers in the strong learning societies (Figure 2), the Nordic countries (Eurostat, 2007) and in Austria (Kailis and Pilos, 2005 and Section 3.2). Second, the large increase in the participation rates in the 1990s among low-educated, but not highly-educated, older workers in Finland (Tikkanen and Paloniemi, 2005 and Section 3.5) speak for the same. Finally, a corresponding observation has been reported from an organisational level (Fuller and Unwin, 2006; Stuart and Perrett, 2006) of the positive effect of a strong learning culture on learning motivation and participation of older workers.

While participation in formal training accumulates as a function of a person’s initial educational level (Section 3 [b] above), the Eurostat study showed that the difference in participation rates between highly educated and low educated people in non-formal education is even higher, the magnitude of the difference varying between countries. In some countries the proportion of the population participating in non-formal education was more than 10 times higher for high-educated people than for low-educated (EC, 2006a). Knowing that older workers generally have lower educational levels, these findings indirectly tell about the huge differences in learning benefits between young and old workers, on one hand, and about the
foreign world of learning for older adults in many countries. To some extent the results naturally also tell about the differences in learning needs between young and older workers. However, it is hard to say what that is exactly, due to the fact that both of these groups have learning needs, often only different. Overall, the discussion about the link between learning needs and learning participation is a highly complex issue related to the discussion of age of the employees.

According to Livingstone (1999), the everyday learning, whatever degree of informal learning becomes documented, stands only for a peak of an iceberg, while most of it remains unrecognised and unknown. The results of Livingstone’s study showed that people reported of participation in organised forms of learning more often, if their learning in everyday context was recognised and acknowledged.

### 3.2. Gender differences

On average the results from the Eurobarometer survey in the EU-25 showed no significant difference between the female (41%) and male (43%) participation rates, but the figures vary in some Member States (Kailis and Pilos, 2005). Females participated more in Ireland, Latvia and Lithuania (8-9 percentage points above males), while male participation rates were higher in France (8 percentage points more than females). A more detailed analysis in different subgroups reveals nuances and the enormous variation in participation in learning activities in Europe. For example, in their analysis Kailis and Pilos (2005) point to the difference between older females aged 55-64 years in Austria (94%) and Hungary (only 4%).

### 3.3. Differences between countries

Overall, there is a great variation from one country to another with regard to the practice of lifelong learning and the development of policies for older workers. The Nomad report (Tuijnman and Hellström, 2001) based on OECD data, shows that for the age group 55-65 years, participation in adult education in the Nordic countries is higher (30% on average) than other OECD countries (below 20% on average). Eurostat data also shows great differences between countries in the level of participation in lifelong learning in 2002/03. The group of countries that are clearly differentiated from the rest are the Nordic countries, the UK and the Netherlands, and from outside the EU Switzerland, Iceland and Norway. In these countries the participation rates are nearly 20 percentage units above the EU average, which is less than 10% (both EU-15 and EU-25) (see also Descy, 2006).

Large differences have also been found between the EU-countries (Figure 2 and Table A1 in Annex 2) (Descy, 2006; Kailis and Pilos, 2005). According to lifelong learning module of the

\(^{(9)}\) Available from Internet: http://europa.eu.int/comm/eurostat/ [cited 31.7.2007].
Eurostat labour force survey (Kailis and Pilos, 2005), the participation rates (in any kind of learning) are highest in Austria (89%), Luxembourg and Slovenia (both 82%), Denmark (80%) and Finland (77%), and the lowest in Hungary (12%), Greece (17%), Spain (25%), Lithuania (28%) and the Czech Republic (29%). Gender differences between countries were already discussed above (Section 3.2).

Sociologists have pointed out more broadly that the same factors that explain active participation in general also explain voluntary participation in education and training (Antikainen, 2001). Together with the high activity in the traditional civic organisations (e.g. in the OECD’s international adult literature survey (IALS)), this finding has been used to explain the generally high participation rates in adult education in the Nordic countries, in particular among the lower educated and those working in lower status occupations (Antikainen, 2001). According to Antikainen (2001) the civic society is the historical cradle to lifelong learning and education, a matter of fact particularly visible in the high participation rates in the Nordic countries. Based on his life-course studies to different training generations, Antikainen concludes that both age-related and socio-historical normative – institutional and cultural – factors have a strong influence on participation in learning and education in a life-course perspective. However, he points out that non-normative events and factors (e.g. unemployment, divorce) can nevertheless have even stronger effect. His conclusion is that the big issue for lifelong learning is to develop work organisations to become less selective and more open to learning.

3.4. Participation among people aged 65+

There is little information available on participation in training of people above 65 years of age. According to the OECD’s international adult literature survey (1995) among people aged 66-75 years the participation rates were 7% in Canada, 10% in the Netherlands and 10% in Sweden (van der Kamp and Scheeren, 1997). Recent data from the UK shows that 19% of 65 to 74-year-olds have recent experience of learning, whereas the rate for over-75s is 10% (Harrop et al., 2006).

3.5. Trends in the participation rates among older workers

Because of the relatively recent interest in older workers as well as varying practice in measuring participation in education and training (e.g. use of different age categorisations and definitions of participation, various definitions of informal learning (9)), we know little of the

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(9) ‘[...] lifelong learning encompasses all purposeful learning activities, whether formal or informal, undertaken on an ongoing basis with the aim of improving knowledge, skills and competence. Participation in formal education (i.e. the regular educational system of each country), nonformal education (i.e. organised and sustained educational activities that do not correspond exactly to the definition of formal education).’
trends in participation among older workers. However, very recently some European statistics have become available. Table 1 shows the participation rates among older workers in 2005 as well as trends from the year 2000 in the EU-25, EU-15 and the new Member States. In the EU-15 almost 1 out of 10 older worker had participated in training in 2005, while this rate was somewhat lower for the EU-25 (8.5%) and significantly lower (2.9%) for the new Member States. Table 1 shows also that while until the year 2002 there was hardly any change in the participation rates for any of these three groups, since 2003 the increase has been rapid in relative terms in EU-25 and EU-15.

Table 1: Older workers’ participation in education and training. Trends 2000-05 (%)

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>45-54 years</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU-25</td>
<td>5.7</td>
<td>5.7</td>
<td>5.6</td>
<td>7.1</td>
<td>8.1</td>
<td>8.5</td>
</tr>
<tr>
<td>EU-15</td>
<td>6.3</td>
<td>6.3</td>
<td>6.3</td>
<td>8.0</td>
<td>9.2</td>
<td>9.8</td>
</tr>
<tr>
<td>NMS-10</td>
<td>3.0</td>
<td>3.0</td>
<td>2.7</td>
<td>3.0</td>
<td>3.3</td>
<td>2.9</td>
</tr>
<tr>
<td>55-64 years</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU-25</td>
<td>2.8</td>
<td>2.8</td>
<td>3.1</td>
<td>3.9</td>
<td>4.8</td>
<td>5.1</td>
</tr>
<tr>
<td>EU-15</td>
<td>3.0</td>
<td>3.0</td>
<td>3.3</td>
<td>5.4</td>
<td>5.4</td>
<td>5.9</td>
</tr>
<tr>
<td>NMS-10</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: EC, 2006c.
NMS = new Member States.

A detailed country overview to lifelong learning participation is shown in Table A1 (in Annex 2). The table shows the situation for working age population (25-64) in 2000 and 2005, as well as the 5-year change. Countries with high participation rates in 2000 (Denmark, Sweden, the UK) not only had high rates five years later but also tended to increase their participation rates most (as percentage points) during that period. However, due to their lower rates in 2000, the relative increase of participation in countries like Spain, France, Luxembourg and Austria was even larger.

Some national data is also available making it possible to trace trends in older workers’ participation rates. The national adult education survey from Finland, is a solid database collected every five years since 1980s (the first interval was 10 years). It allows also for making comparisons of older workers’ (aged 40-64 years) participation rates in work-related learning activities over time. Figure 3 shows the results in the years 1990 and 2000, with a particular focus on low- and high-educated workers.

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education) and informal learning (i.e. activities outside formal or non-formal education, of a low-level of organisation, such as self-study) is distinguished.’ (EC, 2006, p. 38).
The results show that during the 1990s, the low-educated 40-64 year old adults increased their participation rates to such an extent that the long-prevailing difference with high-educated people has disappeared (Tikkanen and Paloniemi, 2005). This shows a strong counter-development to the common educational accumulation effect (see (c) in Section 3 introduction). Related to that, it is in clear contrast to the trends found out in the European level more generally. A recent overview to the indicators for monitoring the EU employment guidelines (EC, 2006c) shows that the increase in participation rates (in absolute terms) in lifelong learning (among 25-64 years old) is clearly related to educational background, and has been most pronounced among the high-educated (Table A2 in Annex 2).

When it comes to the older adults aged over 60-years, there is even less data available. However, the recent NIACE data from the UK shows that while until the early 2000s their participation rate was increasing, since 2003 it has fallen rapidly. The authors relate that ‘at least in part’ to the changes in policy priorities in the UK. In 2005 there was a 24% fall in the number of over-60s participating in publicly funded further education in England (Harrop et al., 2006, p. 5).

To conclude, there is a strong and well-founded belief that education and training will improve the situation of older workers in workplaces and labour markets by improving their employability (OECD, 2006). The effects are also expected to be visible in extended careers and higher employment rates in the oldest age-groups 60+/65+. However, various studies on training participation among older workers have pointed out that education and training alone, not even when added with better recognition, acknowledging and rewarding of competence, based on experience and informal learning, will not be sufficient alone to solve the complex issue of increasing the economic activity of older people (Descy, 2006), or meet the challenges that ageing populations face (Karmel and Woods, 2004).


Figure 3: Comparison of the age-education (% low/high) interaction effect on participation in job-related learning activities in 1990 and in 2000 in Finland
4. Workplaces and HRD promoting lifelong learning for older workers

HRD typically includes the components of training, career development and organisational development (Rocco et al., 2003). This section discusses these perspectives from the point of view of older workers. Regardless of the importance of this area, the description here is bound to be relatively brief. This is because, first, job-training programmes specifically targeted at older workers either do not exist or are uncommon, in Europe as well as in the US or Japan (Rix, 2005). Second, there is little systematic research available on older workers and their situation on organisational level, particularly from the learning perspective (Tikkanen, 2006). During the last few years, reports on various company-based case-studies and measures, however, have started to emerge. Nevertheless, while information on innovative workplace practices is in great demand (von Nordheim, 2003), there has not been much progress about how to implement age-aware human resource policies (Buck and Dworschak, 2003b). While literature about implementation of change in workplaces is in abundance, research on the involvement and participation of older employees in this change is scarce (Tikkanen, 2006). It has been pointed out that various changes that have taken place in work (e.g. increasing flexi-work arrangements) should be favourable to older workers and their employment (OECD, 2006), but this is not always the case.

When ageing has been addressed on an organisational level, the voice and views of employers and management has been dominant (Tikkanen, 2006). When older workers’ perspective has been addressed, it has most often been done separately from the employer or company perspective. Based on a large organisational literature review in the US, Rocco et al. (2003) conclude that it seems that employers and older workers are reacting independently to changing workplace conditions.

In this section we will first take a look at the central organisational issues of importance for older workers learning and learning promotion. The second part reviews the human resources perspective and discussion to the extent it has been addressed from the older workers’ perspective. Also the question of older workers’ competence will be discussed. This section closes with a career perspective. As a part of that the role of labour unions will be briefly touched upon.

4.1. Workplaces as learning arenas for older workers?

4.1.1. The challenge of creating learning-conducive workplaces for older workers

For most of today’s older workers, workplace learning has comprised their vocational learning. Success stories in bringing lifelong learning into the field of older workers relate to what is happening in ordinary workplaces (Tikkanen, 2006). As a part of the recently
emerged comprehensive approach to the challenge of older workers, the need for cooperation between all working life parties have been called for. While the importance of supportive European and national policy frameworks and agreements is acknowledged, several authors (Buck and Dworschak, 2003b; Ilmarinen, 2006; Linkola, 2003; Rocco et al., 2003) have pointed out that at the end of the day, the changes that can truly make a difference to older workers’ situation in working life, have to take place in workplaces and be firmly supported by the employers.

To bring lifelong learning in the workplaces to promote the change in the situation of older workers has appeared to be a slow process, and the structural development has in many cases been deteriorating (Auer and Speckesser, 1997). This has to do both with the slow transformation of the rhetoric of lifelong learning into viable practice and with the ways the addressing of older workers in workplaces has progressed. In the first country to draft guidelines on improving the status of older workers (Rix, 2005), Finland, the discussion on older workers started with the sole concern for rehabilitation and health. The approach was broadened later on to include individual factors (e.g. skills and competence) and various work-related and organisational issues, currently underlining the crucial role of management to intervene more broadly (Ilmarinen, 2006; Linkola, 2003).

Table 2: Employees’ (aged 45-64 years) and employers rating of actions which can be important for older workers for continuing in working life

<table>
<thead>
<tr>
<th>Action</th>
<th>Employees</th>
<th>Employers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improving possibilities for rehabilitation</td>
<td>37</td>
<td>34</td>
</tr>
<tr>
<td>Increasing wages</td>
<td>35</td>
<td>22</td>
</tr>
<tr>
<td>Reducing workloads and tight schedules and increasing options to affect work</td>
<td>32</td>
<td>56</td>
</tr>
<tr>
<td>Improving the work environment</td>
<td>28</td>
<td>71</td>
</tr>
<tr>
<td>More flexible working hours</td>
<td>27</td>
<td>32</td>
</tr>
<tr>
<td>Improving management skills and good supervisory action</td>
<td>21</td>
<td>68</td>
</tr>
<tr>
<td>Increasing educational possibilities and training that promotes occupational skills</td>
<td>13</td>
<td>40</td>
</tr>
</tbody>
</table>

Employees: Work conditions 2003 study, Statistics Finland.

The following is a summary of the discussion and central issues concerning older workers and lifelong learning from an organisational perspective.
4.1.2. Combating discriminatory attitudes and practices in the workplace

Discriminatory attitudes and practices in the workplaces are part of the challenges concerning retaining, retraining and recruitment of older workers. The research literature shows that employers discourage the recruitment of older workers because they are not seen to be flexible enough for modern working life (Tikkanen and Nyhan, 2006a). Studies in the end of the 1990s showed that, soon after reaching 40 years of age, many employees were no longer wanted by employers, in particular in recruitment situations (Walker, 1997a; Nordic Council of Ministers, 2004).

Various surveys have shown that employers hold rather stereotypical views about the strengths and weaknesses of older workers. There are four primary negative stereotypes related to age and HRD: older workers do not want to learn, older workers cannot learn, older workers have problems with new technology, and investment in training of older workers gives a poor return (Gray and McGregor, 2003). In 2001 half of employers in Sweden considered older workers to have less relevant skills than younger workers and to be more rigid and inflexible with respect to the workplace (OECD, 2006). Similar findings exist for other countries in Europe and the US (OECD, 2006). Furthermore, the Third European survey on working conditions 2000 (Paoli and Merlliè, 2001) showed that on average around 4% of workers aged 50 years and over reported having personally experienced age-discrimination or witnessed it in the their workplaces. The figure varied a lot between countries from a low of 1% in Denmark to as high as 14% in Austria. In comparison, two-thirds of US workers aged 45-74 reported discrimination in 2002 (OECD, 2006). The negative attitudes of employers may have a counter-effect to the official efforts to promote the employment of older workers (Rix, 2005). These attitudes may also undermine motivation of older individuals who wish to adopt new attitudes to their work.

A recent survey by a global online careers site Monster (2006) was targeted to European workers’ views on ageism in their workplaces. A total of 8 277 persons answered the question: do you feel your company is ageist when it comes to employing new recruits? The answers were divided as follows:

(a) 46%: yes, they discriminate mainly against older;
(b) 14%: yes, they discriminate mainly against younger;
(c) 16%: yes, they discriminate against both older and younger;
(d) 24%: no, the company seems to have a balanced view on age.

There were large differences between countries in these views. The highest rate of old age discrimination in recruitment was found in Germany (59%) and Spain (54%), while the rate was only 22% in Belgium and 35% in France. The most balanced view on age and most inclusive approach to recruiting across wide range of age groups was found among the Norwegians (40% reported on a balanced view on age) – a situation drawing from a very low unemployment and the government’s initiative towards an inclusive working life in the
country. The results were close to similar in Denmark (40% correspondingly) and Belgium (33%).

While it is vital that workers of all ages have good access to vocational training and lifelong learning activities (OECD, 2006) a common claim among employers is that older workers are not interested in training and development. However, as suggested by the Worktow study (Tikkanen et al., 2002), older workers tend to be highly critical consumers in the training market, due to their long-established, experience-based, highly developed judgement-type skills. They are also very pragmatic when considering training options, their own and their organisations’ overall situation, the task-related relevance of the training and training benefits. In particular in SMEs, training options can be turned down for reasons related to time and other resources as well as the content and training methods (Tikkanen, 2006). Furthermore, training tends to be reactive, ad hoc, tailor-made and narrow-based and not having relevance beyond one particular company. Learning results from this kind of training can run short in assisting older workers to deal with career changes (Stuart and Perrett, 2006). A further aspect to low interest in training among older workers are the CVET practitioners often younger workers themselves as well as business consultants. Their interest in the target group of older workers has been growing very slowly, and in most cases is lacking completely (Tikkanen, 2006).

Also training-related age-discrimination is common throughout the industrialised world. Gray and McGregor (2003) report about a study in New Zealand, which compared results of two HRD-surveys, one targeted to employers and the other to workers aged 55+ showed. The study also showed clear differences between the views of employers and employees in regards training of older workers. A total of 11.6% of the workers reported of discrimination with regard to training. Skilled older workers also considered provision of training from their employer as telling about their attitudes and appreciation, ‘a signal by employers that they were taken as serious contributors’ (Gray and McGregor, 2003, p. 338). Overall, employers’ views were more positive than employees’. A great majority of employers (over 90%) reported that they support training and skill updating irrespective of age. Nevertheless, 32.5% of employers agreed that older workers are less willing to train and 27.4% that they are difficult to train, while of employees 23.6% and 19.7% correspondingly did so (see also Table 3).

4.1.3. Areas where further attention and measures are needed

Missing voice of older workers – from an object to a subject of their own (working) lives

The literature shows that until these days issues like employment, training and advocacy are being done ‘on behalf of the older worker’ (Rocco et al., 2003, p. 169). This calls for efforts to create environments where ‘workers have voice in determining their own capacity for work engagement and disengagement’ (Billett and van Woerkom, 2006; Olesen, 2006; Rocco, et al., 2003, p. 169).
Providing access and opportunity for career development

It is important to extent and balance the examination of retirement incentives against the need to recruit and retrain older adults in the workforce. Encouragement as well as help and guidance are needed for older workers to consider second or even third careers.

A need for ageing-appropriate job design

Dworschak et al. (2006) have called for the need for ageing-appropriate job design, for continuing training, as well as measures to address the management of occupational biographies at the company level. In line with Ilmarinen (2006) they point out that the reasons for older workers’ premature exit from the workplace are caused as much by the non-age-friendly design of workplaces as the individual choice of the older workers themselves. In particular the German and Finnish approaches to older workers has been calling for workplaces where it is possible to grow old (Dworschak et al., 2006), and stress that overall working conditions, work organisation and task assignments are key elements in addressing the issue of an ageing workforce (Ilmarinen, 2006).

Maintaining change competences and flexibility

Stuart and Perrett (2006) have examined factors that contribute to the employability, or the lack of employability, of redundant steelworkers. They highlight the importance of developing change competences throughout the whole of one’s working life. Like some other researchers (Dworschak et al., 2006) Stuart and Perrett suggest that these can be promoted through organising work in ways that continuously foster workers’ flexible skills and attitudes. The authors argue that trade unions can play a significant role in helping older workers to reconstruct their lives through proactive interventions. Olesen (2006) has approached older workers from a life-history perspective – an approach which can help generate new and more open life trajectories for people as they grow older – and proposed a learning way to master change.

Age-management

With the increase in knowledge-work forcing more attention on the human factor in workplaces, a new human resource management (HRM) and HRD concept of age-management (Juuti, 2001) or age-aware management (Walker, 1999) has come into play regarding older workers, marking a positive interest in the situation of older workers in the workplace (e.g. Ilmarinen, 1999, 2003; Rhebergen and Wognum, 1996; Tikkanen et al., 1996; Walker, 1997a, 1999). This is related to the development of a senior policy or a ‘life-phase oriented personnel policy’ as a specific element of an organisation’s overall HRM policy. HRM age-management and senior policy strategies are organisational measures to retain older workers longer in working life. Some organisations claim to have adopted age-aware personnel policies, although a gap between intention and implementation has been noted (Rhebergen and Wognum, 1996; Walker, 1997a). There is also evidence of a lot of hidden age
discriminating beliefs among managers, supervisors and professionals in workplaces (Juuti, 2001). The Dublin Foundation’s work on barriers to and opportunities for age management in companies highlights good practice in relation to such issues as recruitment, training and development, flexible working, health and ergonomics (Eurofound, 2002).

Promoting diversity as a competitive edge

However, it has also been suggested that instead of focusing on age-specific measures, HRM should take diversity as a starting point (see Köchling, 2003, on the mixture of competency adequate measures). Examples of this line of thinking are the diversity management strategy (Karazman et al., 2003) and the approach of the top Employers’ forum on age (EFA network in the UK) which claims to be ‘the first ever employer-led initiative to promote the benefits of a mixed-age workforce and to pledge to make age discrimination in the workplace a thing of the past’ (10). Also combating age-discrimination calls for more age-diverse, multi-cultural workplaces, where opportunities for training and advancement would be based on levels of performance appropriate to the demands of job-positions and that only (Rocco et al., 2003). In this context there is a need for future research on the productivity of inter-generational work teams (Rocco et al., 2003).

4.2. The job-competence of older workers – what do we know?

During the last a couple of decades the changes in work organisation, work (the concept and practice) and workplace – including the tools for working and the ways to organise work (also time and place) – have gone through a transformation, in many cases quite a dramatic one (Ford and Orel, 2005). Besides new demands on job competence and its development, the consequences on older workers’ relative position in workplaces and their employability in the labour markets more generally have been significant. Furthermore, the demographic trends continue to change the constitution of the social communities in workplaces. The latter has also been further influenced by organisational changes, particularly the coming of network- and virtual organisations. The consequences from these to the means, patterns and forms of communication inside the workplaces, in the networks and out of these two (towards clients and customers), pose a challenge in particular to the competence (knowledge, skills, attitudes) of older workers.

There is a strong stereotype about the difference of job-competence between older and younger workers. According to this view, the job performance among older workers is viewed with terms of obsolescence and shortcomings, while that of younger workers is discussed under the frame of ‘developmental potential’. However, besides ICT skills and in some cases foreign languages, we do not have a comprehensive picture about the competence shortcomings and needs among older workers. Furthermore, since the 1990s several studies

(10) Available from Internet: www.efa.org.uk [cited 31.7.2007].
and research overviews (e.g. Sterns and McDaniel, 1994; Warr, 1998) have concluded that age as such is a poor predictor of performance, but still the stereotypes lie deep within us – and little has been done to address the competence development perspective in regards older workers.

Investments in developing basic literacy and ICT skills have been widely discussed in recent years (EC, 2000; 2005). However, for example, recent Norwegian basic skills survey (Vox-Barometer, 2006) on literacy and ICT showed that all adults were highly satisfied with their basic skills in the context of work and did not think further education in these would be useful – even most (60%) of those who were not completely satisfied with their basic skills. Those aged 30-40 years and with highest education were most satisfied (90% of those holding university degree versus 80% of those having only secondary education). Older workers aged 50-65 years generally experienced the least developmental needs in regards their basic skills, but they experienced most often problems in their job tasks related to the use of ICT (finding information or using ICT-systems). Notwithstanding ICT, age differences in skills and learning needs were very small. Specially targeted measures were recommended on the basis of age-education interaction effect for low-educated young, aged below 30 years, and old, aged 50+, persons. The results from the same survey in 2005 showed that also employers are highly satisfied with the basic skills among their employees.

The existing surveys indicate that employers are somewhat ambivalent when it comes to their views on the competence of older workers. On one hand while older workers’ skills and knowledge are regarded as obsolete, they are also viewed as loyal and reliable – even more so than younger workers (Walker, 1997b). Table 3 describes how employers view the strengths in older workers’ competence and job contribution. The findings shown come from the US, but they tend to be common also among European employers.

Table 3: Strengths in older workers’ competence. Employers views on older workers in the US

<table>
<thead>
<tr>
<th>A survey by the Society for Human Resource Management (SHRM) and the American Association of Retired Persons (AARP) targeted to nearly 400 HR-professionals (SHRM, 1998 quoted in McIntosh, 2001):</th>
<th>A study by the National Council on the Aging (NCOA) and the McDonald’s Corporation (Additional Resources, 1998 quoted in McIntosh, 2001):</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 77% agreed that older workers have a higher level of commitment to the organisation than younger workers (only 5% disagreed);</td>
<td>Despite myths circulated when companies were trying to justify trimming older adults from their payrolls, employers affirmed that, in general, older workers:</td>
</tr>
<tr>
<td>• 68% concluded training older workers costs less or the same as training their younger counterparts (6% disagreed):</td>
<td>• had low turnover rates;</td>
</tr>
<tr>
<td>• 57% reported that age does not affect the</td>
<td>• were flexible and open to change;</td>
</tr>
<tr>
<td></td>
<td>• possessed up-to-date skills;</td>
</tr>
</tbody>
</table>
amount of time required to train an employee (14% disagreed);
• 49% determined that older workers grasped new concepts as well as younger workers (18% disagreed).

• were interested in learning new tasks;
• did not experience transportation problems;
• were willing to take on challenging tasks;
• had low absentee rates;
• had few on-the-job accidents.

As an aspect of the broadened view of work-competence, experience-based knowledge has gained value (Paloniemi, 2006). Paradoxically, however, parallel to this development, the value of employees with the longest experience has decreased (Tikkanen, 1998). There seems to be confusion concerning experience-based competence as it is hard to define. It seems clear that the views about knowledge and skills in many companies continue to be narrow due to the excessive emphasis on technological skills as such, instead of viewing them as instrumental aspects of broader competence and new knowledge.

An overemphasis on skills in ICT has been a feature of recent debates on work competence although many researchers argue for a more balanced approach. The OECD DeSeCo project has proposed a holistic view of competence (Rychen and Salganik, 2003). The OECD’s (2006) latest report on ageing and employment outlines a multidimensional and comprehensive approach to lifelong learning in order to extend the careers of older workers.

Billett and van Woerkom (2006) suggest that older workers are caught up in contradictory discourses about work and competence development. They argue that older workers need workplace support for maintaining their competence, but that this is often not available, given the preference for the recruitment of young people. To address this difficult environment, Billett and van Woerkom argue that older people need to take up a more active role and adopt a critical, personal engagement stand with regard to working life and competence development. However, older workers are often caught by vicious circles. It is the peripheral status of theirs in workplaces and the labour market, which often causes that their power to influence decisions affecting their paid employment is usually low (Findsen, 2006). Besides age, gender, social class, race and ethnicity, and geographical location are all variables with the potential to shape possibilities and agency (Phillipson, 1998).

When it comes to the work-competence of older workers, four major issues have been pointed out (Tikkanen, 2006). First, older workers have shortcomings concerning ICT. The central challenge to older workers is how they manage to adjust their competence to the demands of new forms of work and changing working environments (Tikkanen et al., 2002). Second, older workers are prone to suffer from the erosion of metacognitive skills, i.e. skills concerning one’s own learning, which often relate to learning motivation and self-efficacy (see also Dworschak et al., 2006). Third, there are stereotypes about the competence and productivity of older workers, especially concerning their learning attitudes and skills. It has
been pointed out that it is these attitudes that are the main obstacle to opening up employment opportunities for older workers (ILO, 2003). It is perhaps surprising how little the discussion on retaining older workers has brought up the motivation factor which relates to an older worker’s perception of himself/herself as a respected worker whose competence is appreciated and needed. In order to empower older workers, a change of attitudes should also come from society at large and from work colleagues. Media can play a key role here (ILO, 2003) as shown for example by the ‘positive age-talk’ of the Finnish national programme for ageing workers (Linkola, 2003). Fourth, the discussion related to older workers’ competence has typically been based on the deficit-approach, focusing on what they are lacking rather than their strengths. Negative attitudes are reinforced because of difficulties in being precise about the competences required in various jobs, and the over focus on technology-skills. In particular in specialised professions, however, the exit of older workers has been found to mean losses of valuable know-how to the companies (Root and Zarrugh, 1987). Notwithstanding the above, some mentoring models have been developed for securing the transfer of older workers’ experience-based competence to younger workers. Under such a climate with contradictory messages concerning the value of older workers and their work competence, the challenge posed to their learning is to be at the same time both adaptive – ‘to adjust themselves to a possible adverse reality’ (Ellström, 2004, p. 23) in workplaces – and trying to tackle the demand for developmental learning.

Clearly, we need more knowledge about the competence-in-demand and how this is affected by age and various experience. Workplace competence is very context-specific and an overview of it is typically carried in the heads of management as tacit knowledge. The challenge for research is to find more systematic ways to understand this.

4.3. HRD: making lifelong learning a reality for older workers

Participation in formal education and training is the most commonly used indicator for lifelong learning. However, the indicators of investment in human capital are becoming increasingly important (Eurostat, 2005).

It has been suggested that the ‘extent to which older workers will elect to remain or to return to the workplace is related to an understanding of how organisations manage the social, economic, political, and technological trends regarding the employment and productivity of older workers’ (Rocco et al., 2003, p. 156).

While there are some differences between the countries, the similarity of the situation of older workers in workplaces across countries at least in the industrialised world, are more striking than the differences. Ohsako and Sawano (2006), suggest that the changes from a seniority-based promotion and wage system to a competence and qualification based system in working life, may necessitate a more active role than heretofore for employers in promoting lifelong learning in workplaces.
Workplaces can make a difference for providing opportunities for lifelong learning for older workers with the effects ranging all the way down to mitigating the anticipated labour shortages and rising dependency ratios (Fredricksen, 2006). The study by Fredricksen (2006) showed that those older workers, who feel that their workplaces address the values important to them – economic security, informal learning (for personal development), and continuous formal development of knowledge and skills for use in the workplace (ability utilisation) – are more committed to their work and willing to postpone their retirement. Fredricksen concluded that workplaces which organise and value peoples’ contributions and provide opportunities for learning and personal development could offset the trend towards early retirement.

4.4. Career guidance and the role of trade unions

While there are some studies addressing older workers’ careers (e.g. Cahill and Salomone, 1987) or their training and development (e.g. Sterns and Doverspike, 1988), research in HRM and HRD has mainly focused on promoting high-performance and productivity in companies (Whitfield and Poole, 1997) topics which by their nature relate to younger rather than older workers. However, the provision of career guidance and the development of career-management skills have been put forward as key areas for the empowerment of older workers (Sultana, 2004; OECD, 2004).

The role trade unions play in promoting lifelong learning and career development among their oldest members varies from union to union and from one country to another, although the importance assigned to lifelong learning among unions appear to be on rise (ILO, 2000). However, until recently expanding the working careers of older workers has not been on their agenda (Tikkanen, 2006). Towards the end of the 1990s Walker concluded his European study by stating that there was no evidence for signs of ‘partnership between the social partners on the way forward with regards to age and employment’ (Walker, 1997a, p. 40). About 10 years later there are signs that trade unions have started to adopt a more proactive role towards the training needs of older workers. In the UK, trade unions are viewed as important conduits for advice on learning for older workers in particular as approaching their employer in this regard is something they may wish to avoid (Stuart and Perrett, 2006). Tito Boeri, a professor of economics at the Bocconi University, wrote in Financial Times (12.11.2003) that, while being outspoken on many topics, trade unions tend to be ‘coy’ when it comes to the age of their members. According to Boeri, labour unions need to be supported by governments to solve the vicious circle related to the intergenerational conflict, through pursuing policies addressing issues, such as lifelong learning. It is also argued that lifelong learning has become the new employment security objective on the agenda of trade unions, as ‘lifelong learning is becoming as important an entitlement for today’s employee as the right for a pension became in the past’ (ILO, 2003, p. 11). Box 7 shows how the European Trade Union Confederation (ETUC) has defined the framework of actions towards lifelong learning, relating it to the challenge of ageing population, among others.
Box 7  ETUC: framework of actions for the lifelong learning development of competencies and qualifications

A challenge
The ageing population and the social expectations, which have resulted from higher levels of education of younger generations require a new way of approaching learning systems, ensuring that there are opportunities for all age groups – both women and men, skilled and unskilled – if significant increases in competencies and qualifications levels are to be achieved. Lifelong learning contributes to the development of an inclusive society and the promotion of equal opportunities.

Four priorities
The social partners assert the principle of shared responsibility of players with regard to four priorities and call for the intensification of dialogue and partnership at the appropriate levels. The social partners believe that the lifelong development of competencies depends on the implementation of the following four priorities:

- identification and anticipation of competencies and qualifications needs;
- recognition and validation of competencies and qualifications;
- information, support and guidance;
- resources.

5. A summary of characteristics of the research on older workers and lifelong learning

What picture has research conveyed us about older workers and lifelong learning? Have the theoretical and methodological choices in these research possibly influenced to the picture we have, and if yes, in which ways and to what extent? This section takes a summarising overview to these issues, by characterising the research relevant to the theme of older workers and lifelong learning.

Older workers and their learning is an insufficiently researched topic (Rocco et al., 2003). An extensive literature review by Rocco et al. (2003) from the US showed that most of the existing articles on the theme have been written for popular or professional publications.

Most of research about ageing and older workers in working life has been targeted to other groups than older workers themselves, most commonly to employers and management and to HRD personnel in larger companies (Paloniemi and Tikkanen, 2001). As a result we do know a good deal about management’s attitudes towards older workers and their competence, as well as their views concerning older workers learning skills, attitudes and motivation. However, such a methodological choice has left the voice of older workers themselves unheard (Rocco et al., 2003; Tikkanen, 2006).

Our picture of older workers is predominantly being produced through research with a narrow methodology, mostly surveys, typically focusing on training participation or aspects related to it. When these have covered also the views of older workers, age is typically reduced to a single background variable. Thus, with some exceptions existing studies can tell us little about older workers’ perspective to work and learning, and how do they perceive their work, job-competence and learning, or construe the meaning of these and their situation in regards their work, workplaces, and working life in general.

There has been a trend towards a comprehensive perspective and interdisciplinary- and cross-disciplinary research frameworks in general since the 1990s, in particularly in gerontology (to which the theme in question here is linked). Research on older workers, however, has been narrow, carried out mostly by sociologists and economists. Their interests have been in social (health, welfare) and economic issues. Research including individual or organisation learning or training perspective (e.g. in adult education, HRD, lifelong learning) has been rare, but the interest in the theme seem to picking up.

Focus has been by and large on macro level, although some studies have also included case-studies on enterprises (e.g. the combating age barriers in employment project by the Dublin Foundation – see Walker, 1997b). However, since the 1990s various training and development projects on an organisational level with an older worker perspective have been carried out, particularly supported by the European Social Funds. Unfortunately, there is no
systematic documentation of this line of activities as the competence actors in these projects – consultants and training providers – typically do not report from or document their work.

Theoretically, existing research is almost without exception drawing from the deficit-approach as opposed to resource or assets perspective to older workers and their competence. In this line of thinking, obsolescence and shortcomings, as well as negative learning motivation and inflexibility have been emphasised. Some texts with a more critical perspective have recently been produced (Billett and vanWoerkom, 2006; Olesen, 2006), but empirical research in this line is still lacking.

Generally speaking, if we compare the available literature from about the last 10 years with that from before the latter part of the 1990s, a more active view of older workers, also as learners is emerging, albeit very slowly. As discussed earlier in this paper moving beyond the institutionally structured life-course (Buchmann, 1989; Kohli and Meyer 1986) suggests that retirement could in the future become ‘a self-imposed status determined by the worker rather than an institutional norm (Rocco et al., 2003, p. 168)’, and that lifelong learning has potential in playing a vital role in this trend. As this paper has shown, the very last a few years have marked a change of pace towards more interest in older workers and in increasing their activity in working life and in lifelong learning participation. These are signs that, at least in some countries, both working life and the world of lifelong learning has become more inclusive in regards the long discouraged group of older workers. Undoubtedly, at least partly this is an indication of the effectiveness of the political intervention through the Lisbon strategy.
6. Recommendations

On the basis of the review above, several recommendations can be made to promote lifelong learning to older workers:

(a) most importantly the search for new solutions for lifelong learning of and for older workers should be essentially based on including of older workers themselves in the dialogue (Tikkanen and Nyhan, 2006a). This principle should be followed in learning promotion in the context of workplace and in training institutions;

(b) creating partnerships for learning. Continued and more creative efforts and experimenting are needed to reach the hard-to-reach older learners. The challenge here is primarily to bring the world of learning closer to the older workers, less *vice versa*. While this poses a challenge to training institutions and employers, trade unions have also more potential to play a much more visible role to this end, with a stronger focus on supporting career development among their oldest members;

(c) the dialogue between training institutions and employers should be further enhanced. Continued efforts are needed to find sustainable solutions to bring the worlds of work and learning closer to each other. While this principle is valid for all employees, it is particularly important for older workers with low educational backgrounds. Taken that adults prefer informal over formal learning settings, when possible, workplaces should also be used as sites for also more theoretical learning on the side of formal learning settings;

(d) on the side of inclusive workplaces we need inclusive settings for learning. Training institutions should increase the ecological validity of their learning provision for older workers. To this end they should seek to take the experiential world of older learners as a starting point to their learning dialogue. They can do this either by making it principal that their own older teachers are included in teams planning learning provision for older workers, or by consulting older workers themselves in their planning work;

(e) there is a need to develop systematic evaluation of the various measures developed to address the issues of workplace learning and competence development of older workers. Furthermore, dissemination of ‘best-practice’ should place more focus on critical self-reflection and on how to truly reach wider audiences, in particular workplaces. In other words, there should be more focus on how their messages are received rather than solely on how to best send them;

(f) there is a need for research to cover the older workers’ perspective to lifelong learning and extended careers. This kind of research should build on interdisciplinary frameworks and apply multiple methodologies in order to cover the complexity and to some extent novelty of the topic of lifelong learning and older workers;

(g) surveys on working life and lifelong learning activities should be expanded to cover wider life-span than up until 60 or 65 years. Furthermore, surveys on lifelong learning and participation should seek to develop a more unified practice for reporting their findings for older age groups.
### Abbreviations list and acronyms

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>CVET</td>
<td>Continuing vocational education and training</td>
</tr>
<tr>
<td>EC</td>
<td>European Commission</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>HRD</td>
<td>Human resources development</td>
</tr>
<tr>
<td>HRM</td>
<td>Human resources management</td>
</tr>
<tr>
<td>ICT</td>
<td>Information and communication technology</td>
</tr>
<tr>
<td>ILO</td>
<td>International Labour Organisation</td>
</tr>
<tr>
<td>OECD</td>
<td>Organisation for Economic Cooperation and Development</td>
</tr>
<tr>
<td>VET</td>
<td>Vocational education and training</td>
</tr>
<tr>
<td>Worktow</td>
<td>Working life changes and older workers</td>
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</table>
Bibliography


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professionals for vocational education and training (Europrof), Hydra, Greece, 25-27 April 1996.


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van der Heijden, B.I.J.M. *The measurement and development of professional expertise throughout the career*. Enschede: University of Twente, 1998.


Annex 1: additional literature relevant to the theme older workers and lifelong learning (11)

Behrend, C. et al. Chancen für die Erwerbsarbeit im Alter: betriebliche Personalpolitik und ältere Erwerbstätige [Employment opportunities for older workers: in company personnel management and older workers]. Opladen: Leske und Budrich, 2002. Key words: older worker; human resources management; equal opportunities; personnel management; demography; continuing vocational training; in company training; technological change; Germany; report.

Jepsen, M. et al. (eds) A lifelong strategy for active ageing. Brussels: European Trade Union Institute, 2003 (ETUI report). Key words: lifelong learning; older worker; employment monitoring system; social partners; EU countries; report.

Loos, R. Innovations for the integration of low-skilled workers into lifelong learning and the labour market: case studies from six European countries. Luxembourg: EUR-OP, 2002. (Cedefop Reference series; 33). Key words: unskilled worker; training innovation; lifelong learning; labour mobility; EU countries; Spain; Greece; Austria.

McGivney, V. Staying or leaving the course: non-completion and retention of mature students in further and higher education. Leicester: NIACE, 2003. Key words: educational dropout; adult learning; course attendance; further.

Wilke, J.; Schnitzler, W. Organisationsentwicklung und Personalentwicklung in der zweiten Hälfte des Erwerbslebens: Erfahrungen aus einem Modellversuch zur Organisations- und Personalentwicklung mit älteren Mitarbeitern [Organisational development and personnel development during the second half of working life: experiences from a pilot project on organisational and personnel development with older workers]. In: Personalführung, 2002, Vol. 34, No 6, pp. 58-66. Key words: older worker; learning organisation; lifelong learning; small medium enterprise; qualification; training evaluation; personnel management; working age population; Germany; report.

(11) Source: Cedefop, 2004
Annex 2: additional tables

Table 1A: Percentage of the adult population (25 to 64) participating in lifelong learning (excluding self-learning) in 2000 and 2005 and the 5-year change.

<table>
<thead>
<tr>
<th>Country</th>
<th>2000</th>
<th>2005</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>6.8</td>
<td>10.0</td>
<td>+3.2</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>n.a.</td>
<td>5.9</td>
<td></td>
</tr>
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<td>Denmark</td>
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</tr>
<tr>
<td>Germany</td>
<td>5.2</td>
<td>7.4</td>
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</tr>
<tr>
<td>Estonia</td>
<td>6.0</td>
<td>5.9</td>
<td>-0.1</td>
</tr>
<tr>
<td>Ireland</td>
<td>n.a.</td>
<td>8.0</td>
<td></td>
</tr>
<tr>
<td>Greece</td>
<td>1.2</td>
<td>3.7</td>
<td>+2.5(*)</td>
</tr>
<tr>
<td>Spain</td>
<td>5.0</td>
<td>12.1</td>
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<td>France</td>
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<tr>
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<td>5.6</td>
<td>+2.5</td>
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Table 2A: Participation trends in lifelong learning (25-64 years) by educational level

<table>
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<td><strong>Low education</strong></td>
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<td>2.4</td>
<td>2.3</td>
<td>2.9</td>
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<td>4.6</td>
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<td>–</td>
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NMS = new Member States

Source: EC, 2006c.