

# RATIONALES FOR LEARNING IN LATER LIFE

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## ABSTRACT

Äldres lärande är ett förhållandevis nytt delområde inom forsknings- och policyfältet om livslångt lärande. Syftet med artikeln är att beskriva och diskutera de centrala rationaliteter – förklaringar och bevekelsegrunder – som kan identifieras bakom denna utveckling och etablering av äldres lärande som ett eget område. Artikeln tar sin utgångspunkt i de demografiska förändringar som pekar mot att vi närmar oss ett samhälle där en tredjedel av befolkningen kommer att bestå av pensionärer och vilka konsekvenser detta kan få för den teoretiska utvecklingen och forskningen om livslångt lärande. Äldres lärande har också fått ökad politisk uppmärksamhet och denna kan antas bli påverkad av de studier som visar att lärande har positiva effekter på en rad områden, inte minst för de äldres upplevelse av välmående. Artikeln tar upp flera sociala teorier och livsloppsperspektiv som har fått en mötesplats inom gerontologin och forskningsfältet vuxnas lärande. Begrepp som produktiv, aktiv, vällyckat och medvetet åldrande är centrala i dessa teorier och bildar utgångspunkt för de rationaliteter som kan härledas ur teorierna. Artikeln är en sammanställning av nordisk och internationell litteratur inom såväl gerontologi som vuxnas lärande.

*Keywords: Gerontologi, demografi, livsloppsteorier, sociala teorier om åldrande, framgångsrikt åldrande*

## INTRODUCTION

From a historical perspective it was not until quite recently that older age was suggested as a period of development and learning. In pre-modern narratives of life, the stereotype of life was metaphorically described as a circle in which the latest phase of life and the finality of death prepared for new lives. In early modernity, the arch or the hill became a new metaphor. Life had two stages: development and ageing as successive processes of change in time, with the transition point or apex at maturity. Inspired by Enlightenment thought of progress, life in modernity could also be described metaphorically as a rising line of continuing growth (Alheit, 2005; Schroots, 2007). The first scientific studies of the final period of human life were, nevertheless, focused on decline and loss of functions and capacities. Ageing was almost considered as an illness.

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The developmental studies of ageing from the 1970s are characterised by a change in interest from seeing ageing – largely biologically inspired – as decline and loss of functions to a multidimensional focus on ageing as a dynamic of gains and losses in adaptive capacities (Baltes, Freund & Li, 2005). This change towards seeing “age as continued human development” is described by Friedan (1993, p. 87) as “a revolutionary paradigm shift”. Indeed, the older adults in educational settings have become the newest horizon and learning in later life is one of the fastest growing subfields in adult education.

The purpose of this article is to identify and explain the rationales behind the growing number of older participants in learning provision, new policies to include older learners, and learning in later life as a separate field of practice, research and education. The answer offered here is based on a study of literature – articles and books – within gerontology and adult education. The main international journals within these two fields are examined as well as some research reports and studies of participation in adult education and popular adult education in Sweden and Norway. The intention behind our focus on the rationales is to provide a better understanding of the development of the so-called older adult movement within a strategy of lifelong learning for all.

Although it began some years ago, it should be noted that research on older learners is generally not wide-ranging. Few studies deal with groups aged 65 or older (Kim & Merriam, 2004). However, there is a growing literature base. A sign of learning in later life as an emerging separate field is the first Handbook on Older Adult Learning (Findsen & Formosa, 2011). One chapter in the book is devoted to rationales for older adult learning. The chapter traces and assesses the quest of educators to construct a philosophical foundation that could form rationales for why one should teach or retrain older adults and to what end. The authors locate the early rationales within the functionalist paradigm, influenced by theories of role change and activity theory, which focused on how later life education could meet the needs of adults as they experience the transition to old age. A second strand of rationales is comprised of moral arguments concerning older people’s rights and access to learning opportunities. A third is the liberal-humanist standpoint, with its root in philosophies of adult education which, according to Findsen and Formosa, has been uncritically applied to an elderly audience, as is the case regarding the rationales focusing on the hallmarks of experience, dialogue, transcendence and the reflexive modernization that characterize the learning society. Finally, the authors discuss the older adult learning rationales from the standpoint of critical educational gerontology. Formosa has elsewhere (2002) formed a set of principles for the practice of what he terms critical gerogogy. With this concept, he urges researchers to take critical and reflective stances in the studies of later life learning and questions whether learning leads to transformation, empowerment and liberation.

Two other contributions to the discussion of rationales are found in the literature. Mary Alice Wolf asks in an article: Do we need a rationale? (Wolf, 2012). Her answer is a ten-point list of factors that contribute to the growing numbers of

older participants in learning activities. Rather than discussing foundations or rationales from a societal perspective, she focuses on aspects of life from educators' and older participants' point of view. The rationales for older adult learning are also briefly discussed by Alexandra Withnall in her book *Improving Learning in Later life* (2010). Like Findsen and Formosa, she locates the growth of what has been called the older adults "movement" (p. 22) in the emergence of educational gerontology in the 1970s and the functionalist paradigm inspired by role theory and activity theory.

#### Disposition

There is probably a myriad of reasons for learning in later life as a field of practice, education and research. In this article, we will describe what we see as the main rationales and we locate these within different areas. One strand of rationales is related to demography and the increasing attention to the demographic changes. A second strand of rationales is related to the recognition of research and theory of human development, primarily the theoretical and ideological shifts in the field of gerontology and the new specialization, educational gerontology, which emerged in the 1970s. This change within gerontology has been promoted by the evolution of lifespan psychology, life course perspectives and social theories of ageing. A third strand of rationales is related to the attitudinal shifts in the field of adult education and the breakthrough of the lifelong learning paradigm as learning from cradle to grave (Mannheimer, 2007). From these two fields, gerontology and adult education, the idea has emerged – and manifested through research – that older adults might benefit from and enjoy opportunities to initiate or renew their learning experiences. This paradigm shift can be described as a change of focus from seeing old age as a problem to an exploration of productive, positive, active and successful ageing. Rationales for educating older adults are also expressed in the field of policy and here we claim that the documented or supposed positive effects and wider benefits of learning – a fourth strand of rationales – have influenced this policy. Finally, we briefly comment on what research has to say about older people's mental abilities to learn and how new research on cognitive development adds to the rationales for later life learning.

## THE DEMOGRAPHIC CHANGES

In almost all countries in the world, there is an upward trend towards a 'greying' of the population. An analysis of 91 countries comprising 89 per cent of the world's population concludes that the share of elderly people more than 60 years of age is expected to increase from 11 per cent today to 22 per cent in 2050 (Global AgeWatch Index, 2013). In the most industrialized countries, the demographic changes are even more dramatic. Currently, Japan has the highest percentage of older people in the world with 22 % of its population being 65 years or older. However, with the exception of Japan and Georgia, the world's 25 'oldest' countries are all in Europe. In Sweden, for instance, 19 per cent of the population is 65 years or older (SCB, 2012). Everywhere, those in the oldest age range, i.e. over 80 years

old, comprise the fastest growing sector in the total population (Swindell, 2012). In the Nordic countries, it is expected that by 2040 these elderly people will amount to 8 per cent of the population compared to the current 4-5 per cent (Nordisk Statistisk Årsbok, 2011). In the European Union, it is estimated that by around 2020 the total population will consist of three equally large groups; one third will be retirees, one third will be of working age, and one third will be the young people who have yet to enter the workforce (Field, 2012).

Due to increased longevity combined with early retirement, we see a new culture of adulthood where the 'young old' regard retirement as an opportunity to have an active life independent of the demands and duties associated with working and family life. What is new, Fjord Jensen says (2001), is a perception of older age as a positive phase of life in which the retirees will continue to live in the same way as the younger adults. Moreover, the elderly in the future will be better educated than previous cohorts. Education is, as we know, the best explanatory factor behind participation in continuous learning, and hence an increasingly larger share of the elderly will require opportunities for learning and developing themselves. In conclusion, the demographic changes are a central part of the rationale for learning in later life and a driving force behind the development of the field.

## PRODUCTIVE, ACTIVE, SUCCESSFUL AND CONSCIOUS AGEING

The demographic changes pose an economic challenge to society since the major part of the population is outside the productive workforce. An increasing number of people will demand their state retirement pension and many of the elderly will be in need of health services and public care. This challenge has called for efforts in line with the concept of *productive ageing* which concerns how the elderly can be encouraged to continue to make economic as well as social contributions to society in mutually beneficial ways in forms of, for instance, employment, volunteering, caregiving assistance and career-related education and training (Withnall, 2012). EU countries have now adopted a two-tier employment strategy; "to employ the full potential of adult learning with a view to increase the participation in the workforce of young people and extend that of older people" (European Commission, 2006, p. 4).

A second and broader concept is *active aging* defined by the World Health Organisation (WHO) as "the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age." By active, WHO means the "continuous participation in social, economic, cultural, spiritual and civic affairs" (WHO, 2002, p. 12). The concept shifts strategic planning away from a need-based approach – which assumes that older people are passive targets – to a rights-based approach that recognizes equality of opportunity and treatment in all aspects of life as they grow older.

A third concept is *successful ageing*, which is based on a subjective conception of well-being (Rowe & Kahn, 1997). It has primarily been a core concept in gerontolo-

gical literature, but models of successful ageing have also been proposed from the perspective of various disciplines (Lee, Lan & Yen, 2011). The resurgence of the concept can be attributed in particular to the pioneering works of Baltes and Baltes (1990). They focused on the processes the elderly use to achieve desired goals and found these to be composed of the maximization of benefits associated with ageing together with the minimization of the losses. Employing a multicriteria approach, they identified a number of subjective and objective indicators of successful ageing that should be considered within a particular social and cultural context. Key indicators were length of life, biological health, mental health, cognitive efficacy, social competence and productivity, personal control and life satisfaction. From this theorization, Baltes and colleagues elaborated a meta-model of selective optimization with compensation (SOC). In this model, successful ageing is defined as individual goal attainment through minimization of losses as a result of reduction in physical, cognitive and social capabilities and maximization of gains that result through adaption, mastery and wisdom.

Successful ageing is very much related to the concept of active ageing (Lynott & Lynott, 1996; Withnall, 2012). Rowe and Kahn (1997) linked successful aging to lifestyle, which encompasses both activity and proactive strategies. They argue that success lies in keeping active in four ways; active social engagement, active exercise, proactive diet, and avoiding disease (Henricks & Hatch, 2005). Even creativity has been referred to – by the humanistic practitioners in gerontology – as an ingredient of pursuing an active, healthy, and meaningful life in old age (Cole & Sierpina, 2006).

As learning is supposed to be an important component of successful ageing the concept has been very instrumental in promoting the field of later life learning. Although there are different opinions and lack of agreement as to what successful ageing actually entails, it has nevertheless become a mantra for growing older. As Withnall (2012) observes, the ideas about successful ageing have legitimized new ways of thinking about the possibilities of later life. The concept brings, so to speak, a message to educators as well as to older people themselves to explore new ways to grow old.

Finally, we may mention the concept of *conscious ageing*, which has emerged as a cultural ideal representing a genuinely new stage and level of psychological functioning. The concept depicts later life – familiar to the spiritual traditions of the world – as a time for the growth of consciousness and wisdom. The ageing with consciousness movement involves developing and nurturing a contemplative life and engaging in services rooted in the higher levels of consciousness that a contemplative life makes available (Atchley, n. y.). Conscious ageing is a holistic strategy, a typical pattern for coping with the challenges of later life, rather an option and one pathway to strive for (Moody, 2003; Trowbridge, 2007). As such, it is part of the humanist-liberal rationales for learning in later life in which Erikson's (1980) developmental task of achieving generativity in later adulthood has played a major role, i.e. to be concerned with others beyond the immediate family, with future generations and the nature of the world where our descendants will live.

## RESEARCH AND THEORY OF HUMAN DEVELOPMENT

Probably the most comprehensive rationales for learning in later life can be derived from the development of social theories of ageing and life course perspectives. In gerontology and sociology of ageing, the term *theory* was long largely absent in the literature. The early studies of the elderly revolved around the concept of adjustment within a positivist paradigm. Gerontology was the study of the aged, not the process of ageing (Marshall, 2011). A turning point, characterized as the first transformation, was the presentation of the disengagement theory in 1961, which some will say was the first formal theory of ageing (Lynott & Lynott, 1996).

### Disengagement

Disengagement theory, proposed by Cumming and Henry in 1961, views ageing as a natural and inevitable process of withdrawal from social roles and involvements. The theory claims that there is a natural tendency in retirement from work and family life towards contemplation and a need for solitude. Successful ageing is, according to this theory, to live in harmony and peace with the past and present life, preparing oneself for the rest of life and leaving room for the next generation to take over. Disengaging benefits society as it implies the transfer of power from older to younger generations, and it benefits the elderly themselves in the form of social approval of having lower activity levels, more passive roles and less social interaction (Hooyman & Kiyak, 2009). In this way, disengagement is how society prepares for the changing roles of its members and makes older people's adaption to the inevitable a normal part of the orderly function of society (Bond & Corner, 2004).

Disengagement theory follows in part Jung's psychological stage theory. According to Jung, the ego moves with ageing from extraversion to introversion. In later life the individual, he thought, will find meaning in inner exploration and afterlife (Fischer & Wolf, 2001). This process of growing inwardness also corresponds to Erikson and Erikson's view of the tasks of later life as the development of integrity, inner peace and satisfaction of life. This implies a phase of withdrawal in which life can be "relived in retrospect" (Erikson & Erikson, 1997, p. 128). Disengagement theory also coincides with the traditional narrative of being an older person – developed during the building of a welfare state – as one who has been rewarded for a lifetime of labour and should accept and enjoy retirement. The retiree was welcome to maintain activities as long as possible – but according to his or her age (Phillipson, 2009). Ageing should be managed within prescribed roles.

### Activity theory

Disengagement theory clashed with activity theory as promoted by Havighurst (1961). He argued that remaining active and engaged in familiar activities and social roles were the main keys to achieving successful ageing. Also older people have their developmental tasks, Havighurst (1972) claimed. These are mainly linked to adjustment to declining health and physical strength, retirement, death of spouse or family members and to cope with the changing life circumstances. Successful ageing is a result of how these tasks are solved and is more likely to be achieved

by people who remain involved in society (Hooyman & Kiyak, 2009). Activity, whether physical or intellectual, is preferable to inactivity because it facilitates wellbeing on multiple levels; in particular being beneficial for good health and maintaining mental functions. High activity levels were found by Tobin and Neugarten (1961, in Bond & Corner, 2004) to be good predictors of life satisfaction. Activity theory also points to the importance of developing new interests, hobbies, roles and relationships to replace those that are diminished or lost in the course of life.

As we have seen above, both Findsen and Formosa (2011) and Withnall (2010) considered activity theory to be a main source of giving learning in later life a theoretical and scientific foundation. The theory opened the door for adult educators to develop appropriate interventions and legitimated their claims to be able to offer older people choices and opportunities to keep mentally active and healthy and develop themselves (Withnall, 2010). Studies (see later and in Andersson & Tösse, 2014) show that the elderly themselves firmly believe in activity as necessary for successful ageing. It is hardly incidental that the general acceptance of the activity theory coincided with the worldwide proliferation of universities of the third age, and in USA Lifelong Learning Institutes and Elderhostels (Tösse, 2014). The activity theory becomes, so to speak, confirmed by the elderly themselves, who more than ever before demand learning activities, and constitutes a rationale for later life learning by acting and expressing their needs and rights.

#### Continuity theory

A third perspective on successful and productive ageing falls within continuity theory of ageing as articulated by Atchley in the 1980s (Atchley, 1989). According to this theory, the basic personality, attitudes and behaviour remain constant or at least show considerable consistency, throughout a person's lifespan, despite significant changes in, for instance, health and social circumstances. Those who age most successfully are, according to continuity theory, people who carry forward the habits, preferences, lifestyle and relationships from the earlier life into their later life. It is not the particular level of activity that determines one's life satisfaction in later life, it is rather how activities and lifestyles are continuation of earlier ones. Continuity theory states that, with age, we become more of what we already were when younger. Our central personality characteristics become more pronounced, and core values more salient with age (Hooyman & Kiyak, 2009). This is part of internal continuity, which can be assessed in terms of how we maintain our way of thinking and meaning making. External continuity can be observed through the degree of consistency over time of our social roles, activities and relationships (Bond & Corner, 2004).

The reasons behind the growing number of older participants in Nordic popular adult education and special provisions like universities of the third age are congruent with activity and continuity theories, but weaken the credibility of the disengagement theory (Andersson & Tösse, 2014). The continuity theory becomes ambiguous if we take into account what longitudinal studies have demonstrated, namely that

variability increases with age on a number of characteristics. According to Dannefer (2003), these variations can be explained in terms of cumulative advantage and disadvantage, which affect individuals as well as societies, reflecting differences between societies and economic and welfare state policies. If the theory of cumulative advantage and disadvantage can account for differential ageing trajectories the continuation of one's life does necessarily not lead to successful ageing.

#### Life course perspectives

Through life course perspectives, we may achieve insights into the motives for participation and the meaning learning has for older people. Life course is a metaphor but we use it here as a theoretical perspective or orientation for acquiring knowledge of human life. The study of ageing within a life course has indeed become a meeting point for interdisciplinary research in gerontology, adult learning and adjacent fields (Levy, 2005). In our context, these studies have provided additional insights into the learning processes in later life. Taking a life course perspective means seeing life from an individual and subjective position rather than framing life in terms of social structures. Central within the life course perspective is that human development and ageing are lifelong processes. Another principle is that of linked lives, i.e. that our lives are lived interdependently, and the social-historical influences are expressed through a network of relationships (Elder, Johnson & Crosnoe, 2003). A third is the claim on human agency and that individuals construct their own life course through the choices and actions they take within the opportunities and constraints of history and social circumstances (Marshall, 2009). Accordingly, the life course perspective coincides with a constructivist perspective on human beings. Even the words old and elderly are social constructions. Taking this standpoint, we can conclude – and are supported by some research – that it is the various effects of ageing and not necessarily the chronological age that are the determinants of life. The relationship in a welfare state between age and participation in working life and in society is a social constructed experience and process (Phillipson, 2009; Walker, 2009).

Within the life course approach there is, however, a disagreement between those who describes life in terms of distinctive stages or phases and those who, like Field (2012), point to the fact that complex social and economic trends are now tending to erode the boundaries between age-related life stages. Both may, however, add to a fuller description of rationales for learning in later life. Among the most well-known stage theories is Erikson's psychosocial life span theory in which life is separated into eight phases (Erikson, 1980). Erikson's eight phases end with mature adulthood in which the psychosocial crisis the individual is confronted with concerns ego identity and the development of generativity and integrity. Towards the end of his life, Erikson, together with his wife Joan, constructed a ninth stage, *gerotranscendence*, for the latest phase of life (Erikson & Erikson, 1997). Maslow originally used the word transcendence when he revised his hierarchy of needs and suggested transcendence as a natural extension of self-actualization. For Maslow, transcendence was a result of accumulated wisdom and experience and pointed to how people could move beyond time, culture, self and others (McCarty

& Bockweg, 2013). Joan Erikson indicated that this state of transcendence was something to be achieved by older people. It required a stage where people were set free from daily cares and oriented themselves towards finding inner peace and satisfaction. It could also mean a tendency towards spirituality and going beyond the here and now and the rational and material world. In this way, her thinking falls within the theory of disengagement. But gerotranscendence also implied activity as it could even mean, Erikson described, "a regaining of lost skills, including play, activity, joy and song, and, above all, a major leap above and beyond the fear of death" (Erikson & Erikson, 1997, p. 128).

It is, however, the Swedish researcher in gerontology Tornstam (2005a; 2005b), who has elaborated a theory of gerotranscendence. Tornstam views development in later life as a natural progression towards maturation and wisdom, which lead to satisfaction and harmony. In Tornstam's theory of *gerotranscendence*, older age represents a qualitatively different developmental stage characterized by a transformation into a new and wiser way of seeing life and the whole world. He strongly believes in the possibilities of successful and positive ageing, which he equates with 'spiritual' ageing and leading to a phase of wisdom.

Several others point to wisdom as a specific characteristic of old age, but not for all, rather, it may be seen as the ultimate possible achievement of a normal person's growth (Trowbridge, 2007). Wisdom is, however, a complex concept. It can be defined in terms of different dimensions and aspects and be separated into personal and general wisdom. The personal aspect is associated with a developmental stage achieved by age and describes the mature personality or the endpoint of personal growth. Wisdom in the personal sense is a result of crystallized intelligence, which relates to the accumulated knowledge and skills that may increase with age. In the general sense, wisdom is associated with fluid intelligence, which reflects the genetic-biological determinants. Those who have acquired general wisdom are supposed to have reached this stage less as a result of age but rather by having genetic-based abilities, deep knowledge and sound judgment (Staudinger & Dörner, 2007). Research indicates, however, that social processes rather than age mainly affect the development of wisdom (Ardelt, 2010).

More recently, Cohen (2005) suggests a theory that emphasizes the positive aspects of later life. He presents a four-stage account of psychological development of the mature adult. The stages have distinct characteristics but progress from one stage to another is not always linear and the stages overlap: *Midlife reevaluation* (ages 40-65), *Liberation phase* (50s through the 70s), *Summing up* (late 60s through 70s-80s) and finally *Encore phase* from the 70s onwards when major life themes are re-stated and re-affirmed (Cohen, 2005). Cohen describes life as being fuelled with an 'inner push' and argues that retirement can in many ways represent a liberation phase, a time to experiment, innovate and skirt round convention in order to explore new paths to creativity. Learning, in whatever form, plays an important role in this (Withnall, 2012). With reference to studies of how the brain change as we age, he claims that the brain, if properly stimulated by activity, is not losing neurons and getting old, it is also developing. His positive message is that older

people have a “developmental intelligence” in terms of three forms of thinking that actually improve with age; “relativistic thinking”, “dualistic thinking” and “systematic thinking” (Cohen, 2005).

Another theory within the lifespan approach, but not restricted to age, is the above-mentioned selective optimization with compensation theory developed by Baltes and others in the 1990s. The empirical basis of the theory is observations that when individuals reach states of increased vulnerability, they invest in efforts that are oriented explicitly towards regulating and compensating such losses and deficits. Baltes identified three fundamental mechanisms or strategies of life management and successful ageing: selection, optimization and compensation (SOC).

*Selection* refers to the process of specifying particular sets of pathways of development, which implies the narrowing down of alternatives that the scope of biocultural plasticity would in principle permit. For the elderly, it means focusing on fewer domains of functioning or areas of knowledge, skills and activities that they would try to maintain for as long as possible as compatible with biological ageing. Selection can take the form of either elective selection, which is driven by goals, or loss-based selection, which is the response to loss of potentials to reach desirable goals.

*Optimization* refers to the acquisition, application, coordination and refinement of means that are involved in attaining higher levels of functioning. This is what we do in the deliberate practice of skills in, for instance, sports, health, work and education in order to augment or enrich our general reserves and thus maximize our chosen life course. For older people, this means using one’s abilities and skills through the application of residual learning abilities.

*Compensation* refers to the process of counteracting losses in means previously operative in goal attainment and making up for lost abilities by using alternative or substitutive means to obtain functioning.

The SOC processes may be more or less active or passive, conscious or unconscious, and internal or external. This means that they can vary greatly through the life course, but are assumed, according to Baltes, to be universal. Research indicates that as a developmental construct SOC change with age. Generally, the processes peak in mid adulthood and only elective selection continues to increase moderately in older adulthood (Baltes, Freund & Li, 2005; Ouwehand, Denise & Bensing, 2007). But importantly, there is evidence that people who engage in SOC behaviour show more adaptive outcomes and report higher wellbeing and life satisfaction (Baltes et al., 2005). Studies so far suggest that older people direct their resources to those domains of functioning that are important and have high priority for them. It is also interesting to note, from research, that despite the inevitable losses and negative aspects of ageing, many old people maintain a subjective feeling of wellbeing and successful ageing. One example is the study of 854 people by Bowling & Dieppe (2005). 75 per cent of them rated themselves as ageing successfully ‘very well’ or ‘well’. These positive rates of subjective feelings indicate that successful ageing and wellbeing is not about having to face any decline and losses, but about how people manage to deal with these negative changes.

In addition to the SOC strategies, researchers have acknowledged the important role of preventive actions and activities for successful ageing. Already in 1951, J. Paulus suggested that “successful aging must be prepared long in advance; a happy old age is the criterion and reward of a well conducted life” (Ouwehand et al., 2007, p. 879). Later, Aspinwall and Taylor (1997) introduced the concept of proactive coping, which is a sign of wisdom. It refers to the efforts people make to prevent potential losses and stressors from occurring or to minimize their effects. Proactive coping is a strategy for counteracting stressors at an early stage and includes corrective actions in order to reduce the risk of age-related loss of resources. A number of researchers (see Ouwehand et al., 2007) emphasise preventive strategies as being important for successful ageing.

## POLICY RESPONSES TO AGEING

The demographic changes are an economic challenge to society but from the 1980s, a number of policy responses with a wider perspective also appeared. On the global scale, one of the first was the recommendation at the United Nations World Assembly on Ageing in 1983 to acknowledge education “as a basic human right ... and available without discrimination against the elderly” (UN, 1983, p. 38). Moreover, “expenditure on the ageing should be considered as a lasting investment” (p. 14). Principles for Older People, adopted in 1991 by the United Nations General Assembly, focused on independence, participation, care, self-fulfillment and dignity. To promote these principles, the UN declared 1999 as the international year of older people. At the Second United Nations World Assembly on Ageing in 2002, the World Health Organization worked out an International Plan of Action on Ageing. Defining older people as those aged 60+, this plan was based on the concept of ‘active ageing’, referred to above, as a way of enhancing quality of life. The WHO focus was on health, security and participation – the latter meaning opportunities and support for participation in lifelong learning for both men and women as they grow older (Withnall, 2010). In educational policy all over the world, lifelong learning had now become essential for modern life and EU declared that it should embrace all people from cradle to grave.

The concern of learning in later life was highlighted by the EU in its publication *Adult learning: It is never too late to learn* (2007) and the subsequent *Action plan on adult learning* (2007). One result is a range of transnational Grundtvig-funded projects that focus on various aspects of learning in later life (EU, 2010). Finally, we should mention that 2012 was the European Year for Active Ageing and Solidarity between Generations.

Despite there being a major policy focus on older learning, the social justice model and the latter end of lifelong learning spectrum have received little attention other than lip service, Withnall (2010) says. In her opinion, older people’s access to learning opportunities has never been genuinely seen as a focus for educational investments. Funding of education is extremely skewed as regards distribution among age groups, as illustrated by Schuller and Watson (2009). For every GBP 55

spent on learning in England, GBP 1 was allocated to the 50-74 groups, and only 29 pence was spent on the 75+ groups. These researchers claim that there is a massive under-utilisation of older adults' mental capital and they suggest that learning policy should treat 75 years as the normal upper age limit for economic activity (Behrman, 2008; Schuller & Watson, 2009).

## THE WIDER BENEFITS OF LEARNING

The policy responses to ageing in the 1980s and 1990s shifted strategic planning from a demand-oriented approach to a rights-based approach. More recently, we can see another change of focus within policy and practice from rights of every citizen to quality of life in older age (Luppi, 2009). It has been demonstrated in a number of studies that there is a strong link between participation in learning and wellbeing as reported by the learners themselves (Field, 2009; Jenkins, 2011). Indeed, wellbeing seems to be "among the most important outcomes of adult learning", Field says (2009, p. 177). Wellbeing is desirable in itself, but has further consequences for learning as it will stimulate continuing learning. Moreover, recent studies in the UK and elsewhere of the wider benefits of learning clearly indicate many benefits that directly or indirectly influence wellbeing, i.e. self-efficacy and confidence, autonomy, social competences, civic engagement, sense of agency, empowerment or control over one's own life and health maintenance (Field, 2009). In particular, it has been highlighted that education and leisure activities seem to be important factors in helping to prevent illness in later life (Withnall, 2010). But although much research points to a high correlation between education and health, it is not always possible to conclude that learning is the primary cause of these benefits. We must be aware of the fact that the documented links are found on the aggregate level, they can arise from some unobserved third factor or can be explained in terms of cumulative effects. All in all, the conclusion from the available studies is, nevertheless, that adult learning has positive direct effects on wellbeing (Field, 2009). This result relates to all ages but constitutes not least one of the important rationales for learning in later life.

## CAN OLDER PERSONS LEARN?

One of the stereotypical conceptions of older persons is expressed by the saying that one cannot teach an old dog new tricks. In fact, this has been partly supported by research. Thorndike, who wrote one of the first scientific reports on adult learning, proved that adults could learn but the ability to learn, especially mechanical learning, gradually diminished from the age of 40 (Thorndike et al., 1928). The studies of the development of intelligence by Wechlers, published in 1958, drew a similar conclusion (Haugen & Nygård, 2003). However, later studies have showed that the decline of mental abilities starts much later. Moreover, the decline in adulthood seems to be attributed to lack of use and exercise. Some studies even indicate possibilities of reversing the tendencies of deterioration. The living environment has an impact and the challenges one is exposed to in working life and

leisure time may influence the age-related cognitive decline (Fry, 1992; Schaie, 1994, 2010; Fisher & Wolf, 2001). Moreover, impairment does not affect all mental areas equally and there are strikingly large individual variations. It is primarily biologically based fluid intelligence that is reduced with age. The culturally based crystallized intelligence has a longer duration. This latter type can be associated with practical intelligence that concerns the ability to employ mental skills in everyday life. If speed does not count, the crystallized and practical abilities are more important for competences in daily life than fluid intelligence, Fry (1992) claims. A Norwegian longitudinal study of an age cohort, which Sol Seim started in 1939, found that health was a more decisive factor than age for explaining the decline of examined intelligence (Haugen & Nygård, 2003). Similar results have been reported elsewhere (Fry, 1992). The conclusion from a number of studies is that up to the 70s, age has little significance for intelligence and mental abilities (Kliegel & Altgassen, 2006; Jarvis, 2010). If so, and if mental abilities can be maintained longer by learning and training, we have an additional important rationale for learning in later life. Studies of universities of the third age and statements from older participants in adult education also indicate that maintaining cognitive functions constitutes a central motivation for older learners (Andersson & Tösse, 1914).

## SUMMARY

In this study, we have discussed a number of rationales for learning in later life. The attention given to older learners has been accentuated by demographic changes, as one third of the population in industrialized countries will be retirees. An increasing number of healthy and active people will enter the so-called third age and would like to live like younger people, continuing to learn and develop themselves. The social theories and studies of the life course indicate that the basic predisposition to learn exists in the human being and endures throughout the course of life. Studies clearly demonstrate that participation in learning activities and adaptive development as theorized within life course perspectives meet the needs of older people and promote their wellbeing and feeling of successful ageing. Theories and research provide a strong rationale for older learning since learning is a phenomenon that accompanies the individual at all stages of life. There is hardly any optimum or peak age for learning, nor is there any single age period that affects an individual's development more than others. In every phase of life, we can find specific learning tasks and significant experiences resulting from change and growth that the individual will encounter and be challenged by. Therefore, the idea of constant learning and development, Luppi (2009, p. 245) says, "leads us to consider old age as a life phase characterized by change rather than stagnation". Activity and continuity theory point to the importance of continuing activity and learning as a prerequisite for successful ageing. Recent research on mental development indicates that activity and mental challenges may counteract early cognitive impairment, and presents an optimistic message of possibilities for learning well into a high age. These rationales for later life learning seem to have

become part of common knowledge and are adopted by the elderly themselves. In a number of studies, the learning motives, the eagerness to learn more and maintain an active mind rank highest among the reported motivation for older people's continuing studies and participation in learning activities (Mehrotra, 2003; Luppi, 2009; Withnall, 2010).

In brief, the changing demographic structure of the world's population together with the development of research and theory in gerontology and adult education provide a number of empirically based as well as normative based rationales for learning in later life. These rationales have entered the field of policy as demonstrated in recent policy documents. Rhetorically the policy aims to meet the needs of the elderly, admitting their right to education and learning and to promote their quality of life in accordance with a commitment to lifelong learning for all. These ideals form a normative rationale saying that as long as people have the capacity, the resources and the necessity to learn, lifelong learning encompassing the continuum from formal to informal learning should be imperative for all regardless of age. Funding for older learners is, however, marginal, and some claim that the promise of lifelong learning for all, from cradle to grave, is no more than lip service. After all, "the field of later life education is still in its infancy" as Hebestreit says (2006, p. 86). It remains to see whether the power of the discussed rationales will manage to develop later life learning (conceptualized as geragogy?) as a speciality of adult learning, fully incorporate older learning within lifelong learning or lose importance in favour of a stronger emphasis on the workable and economic productive adult.

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