

Gender and active ageing in Europe

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Abstract Increasing longevity in Europe should be a cause for celebration. However, demographic ageing creates challenges. Over the last 10 years the leading policy response to these challenges has been “active ageing”. Despite much positive political rhetoric, it is evident that there is considerable uncertainty about what this means in practice. Also it often serves as a convenient term for a range of policies which affect men and women differently. This article argues that an active ageing strategy can provide a basis for countries to respond to the challenges presented by an ageing population. However, this strategy must reflect the need for a partnership between citizens and society and be comprehensive, noncoercive, and inclusive in its approach. In particular, it needs to acknowledge the gendered nature of ageing and previous life course events and emphasise well-being rather than just the production of resources and services. Finally, it contends that the designation of 2012 as the European year of active ageing provided the context for a renewed focus on active ageing policy in the European Union, an opportunity which should be embraced urgently.

Keywords Active ageing · Gender · Employment · Health · Pensions · Volunteering

Introduction

Demographic ageing is a cause for European celebration. There were approximately 87 million people aged 65 and

over on 1 January 2010 in the EU-27 (17.4 % of the total population) compared with 59.3 million (12.8 %) on 1 January 1985 (EuroStat 2012). However, the scale of population change and its implications for policies concerning older people have only recently become a central focus of the European policy agenda (ActivAge 2005). The leading policy response, thus far, is the “active ageing” framework with its emphasis on maximizing health, participation, and security to enhance quality of life as people age (World Health Organization (WHO) 2002).

There has been much debate about how the framework can be operationalised in a manner which reaches all citizens (Boudiny 2012; Walker 2002). One aspect of active ageing which has been neglected is the impact of gender on experiences of ageing given that “gender differences and inequalities are a fundamental feature of social exclusion and poverty, especially in old age” (Corsi and Samek 2010, p. 7). In EU countries, with the exception of Hungary, older women are poorer than older men, on average. For example, the poverty rates for women/men over 65 years of age in Estonia, Latvia, and Lithuania are approximately twice as high among women as men (Curdova 2010). While the gap is smaller in other countries, it is almost exclusively to the detriment of women (Marin and Zólyomi 2010). The impact of the present recession has also led to deterioration in living conditions, especially for those with the lowest incomes, among which women are over-represented. For instance, material deprivation increased by 2–5 % in Hungary, Greece, and Spain (2008–2010) and Ireland (2008–2009) (EC 2011). The gendered nature of poverty in older age reflects women’s constrained opportunities across the life course including the unequal provision of care, its impact on employment, and, subsequently, women’s greater likelihood of reaching retirement with inadequate pensions (Foster 2010). Inequalities also reflect the extent

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to which welfare systems, particularly pension systems, address these diverse experiences and compensate for relative disadvantages in the division of work and care.

Therefore an active ageing framework needs to consider the specific challenges that women face in the ageing process. Towards this end, we first examine the idea of active ageing, its emergence and potential significance. Then specific policy measures are explored in relation to gender. We focus on active ageing strategies in four gender-relevant areas: increasing the participation of older workers, promoting training and lifelong learning, creating an age-friendly environment and enhancing health. Finally, we consider the future direction of active ageing policy in Europe and the need to acknowledge the diverse life experiences of men and women.

The emergence of active ageing

Active ageing is a vision for policy in which facilitating the rights of older people will enable the expanding population to remain healthy (reducing health and social care costs), stay in employment longer (reducing pension expenditure) while also fully participating in community life. The concept of active ageing, which lacks a precise universally agreed definition, is a relatively new one in Europe, achieving widespread currency only in the past 10 years, largely due to the World Health Organisation (WHO) and European Commission (EC). However, it is commonly used to mean “all things to all people” (Walker and Maltby 2012).

Active ageing emerged in the United States during the early 1960s as the antithesis of the theory of disengagement, which viewed old age as an inevitable period of withdrawal from roles and relationships (Walker 2006). At that time the key to “successful ageing” (Pfeiffer 1974) was perceived as the continuation of activity in older age (Havighurst 1963). However, this approach was predicated on reductionist aims and placed an unrealistic expectation on individuals in older age to maintain levels of activity associated with middle age, regardless of functional limitations. Thus, it failed to acknowledge the heterogeneous nature of older age.

The concept resurfaced in the form of “productive ageing” during the 1980s in the USA. This reflected a variety of socio-political developments with researchers beginning to focus on human development over the life course rather than on older people specifically. The life course perspective recognises that life experiences, inevitably organised by social relationships and societal contexts, powerfully shape how people grow older (Elder 1975; Walker 2005). The notion of productive ageing became an important concept in the search for a more

positive approach to ageing (Bass et al. 1993). This discourse was also in harmony with policy maker’s increasing concerns regarding pension and health care costs and a desire to increase productivity. Therefore, in reality, productive ageing often became focussed narrowly on the economic production of goods and services (Walker 2009).

In the 1990s, a new concept of active ageing began to develop which emphasised the link between activity and health, and the importance of healthy ageing (WHO 1994). “Active” here means “continuing participation in social, economic, cultural, spiritual, and civic affairs, not just the ability to be physically active or to participate in the labour force” (World Health Organization (WHO) 2002, p. 12). It is about the optimization of activities related to employment, politics, education, the arts, and religion and increasing the paid and unpaid contribution older people make to society, challenging views of older age characterised by passivity and dependency, alternatively emphasising autonomy and participation. At the same time there is an emphasis on activities designed to ensure the protection, dignity and care of older people including physical, social, and financial needs and rights (Stenner et al. 2011). The World Health Organization (WHO) (2002) definition added further emphasis to the case for re-focusing notions of ageing away from employment and productivity, which risks the marginalisation and stigmatisation of those unable to work or who choose not to, towards a more holistic approach which considers a variety of factors which contribute to well-being in linked policy terms including quality of life, mental and physical well-being and participation (Walker 2002).

Active ageing policy

Ageing arose as a central European policy issue in the early 1990s, when the European Commission (DG Employment and Social Affairs) established an “observatory” to study the impact of national policies on ageing and older people. European research began to chart a new approach which recognised the need for remedial action, but also the importance of a comprehensive preventive strategy of age management which operated across the whole life course (Ilmarinen 2010; Walker 1997). The European year of older people in 1993 represented the first proclamation at this level of the key elements of a new active and participative discourse on ageing (Walker and Maltby 1997).

The United Nations’ (UN) year of older people 1999 was the next significant step in the development of a European discourse on active ageing, outlining the significant challenge Europe faced to reverse its early exit labour force culture. The policy document, “Towards a Europe for all Ages” (1999), stated that “preparing for longer, more

active and better lives, working longer, retiring more gradually and seizing opportunities for active contributions after retirement are the best ways to secure the maximum degree of self-reliance and self determination throughout old age” (EC 1999, p. 22). It identified four challenges: the decline of the working-age population, expenditure on pensions systems and public finances, the increasing need for care, and diversity among older people’s resources and risks. However, the broader scope and potential of active ageing was subsequently overlooked as employment became the main focus. For example, the EC’s 2009 “Ageing Report” emphasised raising the retirement age, restricting access to early retirement schemes and a stronger link between pension benefits and contributions to create better incentives to remain in the labour market.

In sum, the last two decades have seen the evolution of a European policy discourse on active ageing which has comprised two contrasting models. First, a more dominant one emphasising a narrow economic or productivist approach, which, focuses largely on employment policy and the extension of involvement in the labour market. In contrast, a more comprehensive approach to active ageing emerged, supported by the WHO and some parts of the EC. While there is some evidence that these two approaches are gradually coming together, in practice the actual policy instruments still focus primarily on employment (Walker and Maltby 2012). The European year of active ageing and solidarity between the generations, 2012 (the European year 2012) provided the potential to further develop a more comprehensive approach and a more gender sensitive active ageing framework. It aimed “to help create better job opportunities and working conditions for the growing numbers of older people in Europe, help them take an active role in society and encourage healthy ageing” (EC 2010c). However, it appears that this opportunity has been lost.

Increasing labour market participation in older age

While low employment rates among those aged 55–64 are prevalent throughout Europe, there are significant differences between women and men in this age group (41 % compared with 59 %) in the EU (EC 2012). This is highly significant given that one of the main strands of active ageing has focussed on increasing older worker employment rates (EC 2010a). In fact, the Europe 2020 guidelines for employment policies of Member States advocates increased female labour force participation at all ages as a precondition for boosting growth and tackling demographic challenges in Europe (EC 2010b). However, across the EU men are more likely to be in full-time employment than women while atypical forms of employment are increasingly common among women (Eichhorst et al. 2011). The average rate

of part-time employment increased from 12.7 to 20.9 % between 1987 and 2009 and, among women, this rose by about 9 % points to 36.5 % (Eurostat 2010). Moreover, approximately 30 % of women with caring responsibilities are economically inactive or work on a part-time basis due to lack of care services (Leschke 2011). Given the earnings-related nature of most pension schemes, the impact of caring extends far beyond employment and into older age (Foster 2011). Care credits are one way of “compensating” women for periods of unpaid care, but they do not account for wage penalties associated with time out of employment and largely apply to first/second pillar pension provision. The significant number of women with limited savings for retirement has highlighted also the benefits of providing opportunities for extended working lives in line with an active ageing approach. The economic engagement of older workers contributes to their pension coverage, to economic growth and adds to the tax base (Advisory Committee on Equal Opportunities for Women and Men 2011).

Pension policies

Productivist ageing policies in a number of countries have involved increasing the age at which first tier public pensions are received and incentivising delayed pension receipt (Naeyele and Walker 2007). For instance, in the first tier state pension, a much closer link has been established between contributions and benefits in a number of countries, which have been accompanied by an increasing emphasis on private forms of pension provision (Foster 2012b). A further trend is the abolition or severe restriction of survivor (e.g., widows) benefits in favour of more strongly individualised systems (Leschke 2011). In Europe additional or new forms of private pension have been introduced (Germany, Sweden, and the UK), the retirement age has been raised (Austria, Germany, Portugal, and the UK), pensions reduced for those who retire early (Sweden and Germany), the number of years of contributions raised for entitlement to full public pensions (Belgium, Sweden, Germany) and early retirement incentives reduced (Denmark, Finland, Germany, and the Netherlands). Reform measures to improve pension system sustainability in Member States have, in the majority of cases, led to the reduction of pension rights of workers with implications for those most disadvantaged groups in society, including women (Curdova 2010). These reforms may create new income risks in retirement as well as “perpetuate and even deepen social inequalities in terms of income, social security and quality of life in old age” (Naeyele and Walker 2007, p. 164). This is of particular concern because male work patterns are often the reference point for the calculation of pension entitlements, overlooking gender differences in work and care (Foster 2012a; Ginn 2003; Marin and Zólyomi 2010).

Active labour market policies and flexible employment

In addition to pension reforms, a number of active labour market policies (ALMPs) have been adopted to encourage older workers' participation in the labour market in accordance with the narrow active ageing framework. These include enabling more flexible forms of employment and financial incentives to employers and employees to encourage the employment of older people (Botti et al. 2011). For instance, in the UK, the New Deal: 50 plus was developed to encourage people aged 50 or over and in receipt of certain benefits for 6 months or more to re-enter employment. However, the scheme was gender neutral and the majority of participants male (Atkinson 2001). Similar schemes that were introduced elsewhere (Corsi and Samek 2010) also lacked a gender dimension.

The process of modifying working time arrangements can be an important factor in helping older workers to remain in employment longer. For instance, part-time work can be a means of enhancing choice and the work-life balance as well as the employment rate of older workers, especially women (Leber and Wagner 2007). In Austria, there is an old age part-time scheme which allows older workers to reduce weekly working hours without losing pension entitlements, unemployment or health insurance. In Germany, the law on part-time work enables older employees to gradually exit working life without drawing a pension (Corsi and Samek 2010). Yet, Member States still differ considerably in the levels of part-time employment of older workers, ranging from almost three-quarters for women in the Netherlands to zero for men in Estonia (Zaidi and Zolyomi 2011).

Combating age discrimination in employment

Measures that combat age barriers and/or promote age diversity are important in encouraging active ageing. However, most age management policies are gender-blind. In practice, gender-specific age management strategies could be invaluable in view of the discrimination faced by older women, who are often seen as being older earlier than men (Itzin and Phillipson 1993). While workplace discrimination based on age is prohibited in EU-legislation, the application of the EU Directive is variable (Walker and Maltby 2012). Therefore, there is a need for a sustainable approach to active ageing which takes into account gender equality and the need to reinforce protection against discrimination (Advisory Committee on Equal Opportunities for Women and Men 2011). The experience of older people, and the valuable contribution which they can make to society (in terms of employment and more generally) need to be recognised and promoted. In order to facilitate this, campaigns focused on ensuring

employability of ageing workers and combating ageism have been launched in several countries, often with the involvement of social partners and non-governmental organisations (Corsi and Samek 2010). For instance, in Scotland, the All Our Futures Strategy (Scottish Executive 2007) funded an awareness campaign to combat ageism and promote positive images of older people called "See the Person, Not the Age" which resulted in a website, a television commercial and billboard posters. Such initiatives need to counter negative images of older people as passive recipients of services and to reflect gender differences in growing older.

Education and training

The active ageing framework has embraced the need for adult training and lifelong learning. Governments in most EU countries promote these goals through age-related policy frameworks and general targets for the regulation and encouragement of further training (Walker 2002). However, while women constitute a considerable proportion of workers and jobseekers enrolled in adult education programmes, men participate more frequently (Corsi and Samek 2010). There are considerable disadvantages for women learners as their capacity to actively participate in lifelong learning is affected by unpaid domestic and caring responsibilities. Where financial support and incentives have been used to enhance integration into employment for older workers by providing training, gender differences is hardly taken into account. Training and the development of skills may assist older women to participate in the labour market on more equal terms with men and younger employees. It can also assist in helping people with the transition to retirement and older age, in enhancing quality of life and social inclusion rather than simply focussing on employment (Davey 2002).

An age-friendly environment and volunteer work

Active ageing also needs to focus on opportunities for leisure and recreation, age friendly environments and providing opportunities to engage older people through volunteering (Eurofound 2011). An age-friendly environment, including suitable transport links, housing provision, public spaces, services and leisure facilities, and a socially cohesive community which offers opportunities for an active life (including voluntary work) can have a crucial impact on maintaining the quality of later life (Ahtonen 2012; Scharf et al. 2004). In practice participation is often gendered in that women are over-represented among those who live alone and are socially excluded as a consequence

of their longer life expectancy (Eurofound 2011). The active participation of older women in voluntary activities may be one way to reduce their risk of isolation. There is a considerable amount of latent volunteer potential among economically inactive older people and their inclusion would contribute both to their own well-being and social needs (Ahtonen 2012; Walker 2002).

While many countries are promoting volunteering, gender seems to play only a subordinate role in projects, despite men being more frequent volunteers than women in Europe (Zaidi and Zolyomi 2011). Furthermore, older men and women are sometimes excluded from volunteering as a result of concerns about high insurance premiums which lead some organisations to establish age limits (Eurofound 2011). Such age barriers serve to divert attention from possibilities which exist for older adults whose abilities have altered (Boudiny 2012). There are also differences in the types of volunteering men and women undertake as gender stereotypes continue to operate in associational spheres of society with older men's volunteering being concentrated in prestigious areas and activities of "honorary political offices" (such as in Cyprus, Germany, or Portugal), with older women concentrated in less visible activities in areas of "social engagement" (Corsi and Samek 2010).

Health

Much of the focus on ageing and health is on the implications of productive ageing linked to labour market involvement. For instance special health policies targeted at older workers, to support their work-ability and employment retention, in the form of workplace-based health promotion schemes have been used (i.e., Iceland, Liechtenstein, and Germany) although these programmes are rarely gender sensitive (Corsi et al. 2009). However, health is also related to other areas of active ageing including the capacity to participate in society more generally (Walker and Maltby 2012). While the focus on health has effects on men and women, the fact that women live longer on average with greater levels of morbidity, disability and co-morbidities, suggests the need to implement gender responsive policies and practices (WHO 2007). This also has implications for women's demand for (and involvement in) care provision.

Active ageing depends on a variety of inter-connected factors which affect well-being, the onset and progression of disease and how people cope with illness and disability. For instance, women who are poor are more likely to have inadequate housing, to experience societal violence and not to eat nutritious foods (WHO 2007). The prevention and alleviation of poverty among older people through policies

which provide a social safety net at key times in the female life course and particularly when women are unable to earn an adequate wage are important for healthy ageing (Ahtonen 2012). Ultimately, the goal is to prevent and manage chronic diseases, postponing disability, and death while enabling active ageing for as long as possible.

Locating women at the centre of active ageing

Despite increased attention being given to active ageing, it is evident that the EU Member States still lack a coherent and integrated approach as well as a clear understanding of the gender implications of active ageing strategies (Walker 2009). The critical importance of gender in relation to numerous aspects of an ageing society, including differences in access to health and education, domestic and caring responsibilities, paid involvement in the labour market and pensions are not sufficiently embodied in current active ageing strategies. In practice most policies are gender blind and do not explicitly target older women, despite their greater representation among the older population. Furthermore, when the dominant focus is on employment this essentially reduces the active ageing discourse to its precursor, productive ageing. This may serve to exclude certain people from ageing actively, especially those not engaged in paid employment (Walker 2009). While measures aimed at encouraging older adults to work longer are necessary, active ageing must have a more extensive remit which emphasises continued participation in social, economic, cultural, spiritual, and civic affairs (World Health Organization (WHO) 2002).

Where productivist approaches to the notion of active ageing are dominant, this has led to measures predominantly based on the male trajectory of work and retirement which largely ignore the different needs of older men and women. For instance, frequent features of women's employment such as career breaks, part-time work and low pay are not sufficiently taken into account (Ginn 2003; Foster 2011). The reconciliation of work and care responsibilities through family friendly strategic priorities is likely to boost women's position in older age (Frericks et al. 2009). However, there is also a need for a renewed emphasis on the redistribution of responsibilities rather than an approach which simply focuses on how to deal with the consequences of inequality. For example, attempts to compensate women for their caring responsibilities in the form of credits fail to achieve long-term equity (Leschke 2011). While a policy agenda which focuses specifically on older women may be too late to suitably redress these issues, it can help to identify these foundational inequities and assist in developing strategies to encourage gender equality.

In essence, the adoption of a life course approach, in which the structural embodiment of age and gender-sensitive policy is an important tool in policymaking, is essential to improve labour market involvement, social inclusion, and active citizenship. One policy response to gender inequality in the EU has been the introduction of gender mainstreaming which involves the systematic attempt to embed gender equality in governance and culture (Rubery 2005). It includes the process of “mobilising all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account at the planning stage, their possible effects on the respective situation of men and women” (EC 2008, p. 5). This means systematically examining policies and taking possible gender effects into account when implementing them. While this has the potential to assist all policies, including those associated with active ageing, the transformative potential of mainstreaming as an equality strategy has been obscured by its piecemeal implementation (Squires 2005). In fact, an EC (2008) assessment of 30 countries indicated substantial differences in the organisation and implementation of gender mainstreaming and gender equality. Although most countries had developed initiatives the focus was deemed to be rather “narrow and patchy” and sensitive to political change. In effect, a gender lens analysis, applied to all policy areas regardless of perceived relevance to gender, may be incorporated in order that any effects across disparate groups of women are visible (Lewis 2006). An approach with a transparent organisational structure with enforcement mechanisms has the potential to benefit women of all ages and ensure that policies undergo a comprehensive analysis through a gendered lens. This will help to ensure that the active ageing agenda is not a gender neutral one.

To fully comprehend the scope and potential of active ageing in relation to gender, it is important to outline what a comprehensive strategy constitutes and the principles underlying it. While the foundation for this strategy already exists in European and WHO documents (EC 1999; World Health Organization (WHO) 2002) it cannot be assumed that active ageing currently exists in practice. Walker (2002, 2009) has outlined seven key principles as the basis for a strategy on active ageing to ensure it can be employed in a comprehensive and consistent manner and in a way which will benefit both men and women.

First, “activity” should involve all meaningful pursuits that contribute to the well-being of the individual concerned, including their family, local community, or society more generally and should not be concerned solely with paid employment or production. Therefore, activities such as volunteering, an area in which women are under-represented, should be as valued as paid employment. This wider focus is particularly pertinent for many older women

who fulfill important unpaid roles in society including caring responsibilities. Older adults and women in particular may stop work in order to care for their grandchildren and by doing so enhance the work-ability of the intermediate generation (Eurofound 2011).

Secondly, active ageing should be largely a preventative concept, which means involving all age groups across the life course. For instance, the promotion of preventative medicine, lifestyle, diet, and consumption patterns are increasingly influential in determining ill-health at all ages (ActivAge 2005), or pension credits for caring, disproportionately performed by women, can help to prevent poverty in older age (Foster 2011). Furthermore, viewing policy through a gender lens and acting accordingly may serve as a preventative approach. Thirdly, active ageing should encompass *all* older people (as well as younger age groups), even those who are frail and dependent. A focus only on the “young-old” has the potential to exclude the “old-old” from the notion of active ageing (Boudiny 2012). This has particular significance for women given their greater representation in this group, and, as such, the common omission of old-old from active ageing debates disproportionately affects women.

Fourthly, intergenerational solidarity should be a key feature of active ageing, involving fairness between generations and the opportunity to develop activities that span the generations. This solidarity is apparent in caring commitments for grandchildren, largely performed by women in older age. Fifthly, the concept should include both rights and obligations. Therefore, rights to social protection, lifelong education, training, and so on should be accompanied by obligations to take advantage of education and training opportunities and, wherever possible, to remain active in other ways. Where labour-market objectives are prioritised, educational benefits tend to be restricted to the younger old, excluding many women, despite the fact that lifelong learning has a much wider scope than employment (Boudiny 2012). Sixth, active ageing strategies should be participative and empowering with a combination of top-down policy action to facilitate activity, but also opportunities for citizens to take action from the bottom up. This may result in people developing their own forms of activity and should be equally available to men and women (Scharf et al. 2004). Women’s greater likelihood of poverty in older age must not detract from their capacity to be involved. Seventh, and lastly, it is important that active ageing respects national and cultural diversity in Europe, for example on a North–South basis. It must also recognise country-specific challenges to the implementation of particular active ageing strategies including those associated with extended employment when levels of unemployment remain high, such as in Spain, Greece, and Italy (EC 2011). However, these strategies should incorporate a gender analysis in order to ensure that these challenges are not disproportionately faced by women.

Conclusion

This article has shown that, while women face-specific challenges in relation to active ageing, these are largely not reflected in policies to implement this approach. While there has been a transition from the perception of older adults as predominantly passive recipients of welfare to a more active political orientation, encouraged by policy makers, there is still a strong policy emphasis on productivity. We have argued that active ageing has the potential to provide a framework for the development of global, national and local strategies relating to population ageing and the specific situation of women. It can assist with the process of optimising opportunities for health, participation, and security and as a way to enhance the quality of life as people age (Walker 2002). The paradigm of active ageing proposed above consists of an approach which aims to increase participation and well-being as people age and which, ideally, operates simultaneously at the micro, meso, and macro levels. It is a policy agenda which centres on ageing which includes older people, their needs, desires and choices. A strategy which involves joining up separate policy areas, such as employment, health, pensions, and education to promote active ageing has the potential to assist with the challenges of workforce ageing, the pressure on Europe's social protection systems and to enhance the experiences of older women. The European year 2012 provided an opportunity for such an agenda to be advanced across the EU, but the main thrust of the year was on productivity and the economic engagement of older people. A reassessment of active ageing policy is urgently required. There is also a need to share examples of good practice by Member States, some of which have been highlighted here. The aim should be to implement a comprehensive, gender sensitive strategy which both prevents later life deficits and promotes the active social participation of all ages.

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