

## PREPARATION FOR (ACTIVE) AGEING AND (ACTIVE) OLD AGE THROUGH THE ANDRAGOGICAL-RESEARCH OPTICS

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**Abstract:** The submitted study has a theoretical research character. In the first part, the author analyses the concepts of ageing, active ageing, old age and active old age. Proceeding from the opinion of R. Čevela, Z. Kalvach and L. Čeledová (2012), it is necessary to distinguish 1) successful ageing and healthy (active) old age, 2) usual ageing and old age, and 3) pathological ageing and pathological old age as well. The second part deals with chosen national and foreign research focusing on preparation for (active) ageing, (active) old age, or leaving to retirement.

**Keywords:** (active) ageing, (active) old age, preparation for (active) ageing and (active) old age, education of adults, research.

### Introduction

Several sciences or scientific disciplines, such as literary science, anthropology, medicine, psychology, sociology, theology and educology (compare, e.g. Kruse, 1994; Grün, 2008; Žemberová, 2014; Křivohlavý, 2011; Sak, Kolesárová, 2012; Hegyi, 2013 and others) deal with the old age and ageing as research variables. The submitted study looks at (active) ageing and (active) ageing a priori with the andragogical optics.

It is possible to use the potential of education also in people's preparation for their ageing and old age (a pedagogical-andragogical phenomenon). In this way, when they reach retirement age, their ageing and old age can be really denoted as active ageing and active old age (a geragogical phenomenon).<sup>1</sup> P. Novotný et al. (2014, p. 117) confirm the mentioned opinion regarding the relationship between active ageing and education/formation. They say that „education increases adaptability and contributes to managing social and societal changes reflected in every individual's life. Education offers a possibility to focus on new perspectives and values, and it stimulates civic activities. At the same time, education positively influences health, and it prevents social exclusion“.

The submitted study will document these and many other acquired results about the importance of education for ageing and old people<sup>2</sup>.

### 1 About the concepts (active) ageing and (active) old age

In the beginning, it is crucial to mention that we perceive a significant difference between ageing and active ageing on one side and, on the other side, between old age and active old age. However, these processes and periods can overlap mainly in the last periods of life when people are already in retirement age and are getting older (Határ, 2019, p. 97).

Irreversible changes of the living organism, such as functions of time and environment, characterise ageing as a process (Oswald, 2000, p. 8). A. Kruse (1992, in: Oswald, 2000, p. 11) states that ageing is „characterised with:

- intra-individual variability (it is not the same in all functions),
- inter-individual variability (significant differences between people),
- dynamics (positive and negative changes),

<sup>1</sup> In his publication, E. Livečka (1979, p. 26) writes about *education to old age and in old age*. The scientific work by R. Čornaničová (1998, p. 124) is based on this concept. She mentions *pre-senior education* (preparation for old age), *pro-senior education* (a transgenerational perception of the senium issue) and *proper senior education* (education in old age). We fully respect these concepts in our work.

<sup>2</sup> We can also find the mentioned differentiation between *an ageing person* and *an old person* in the works by H. Haškovcová (2010), I. Tomeš, L. Bočková (2017) and others.

- proper developmental potential (possibilities to carry on),
- contextuality (a mutual influence with social and environmental elements)
- life perspective (an impact of previous periods of life)“.

For the sake of completeness, it is essential to mention that ageing is accompanied not only with biological changes but also with mental, social and spiritual changes (more in detail: e.g. Hotár, Paška, Perhác et al., 2000; Balogová, 2005; Ondrušová, 2011; Kováč, 2013; Határ, 2014; Kaminská, 2017).

R. Čevela et al. (2014, pp. 17 – 18) understand old age as „a consequence of ageing, a late phase of a naturally long life. This phase has its usual characteristic features – in the given time and society – that are related to the phenotype (appearance), functional condition, bio-psychological parameters (the so-called biological old age), social roles, social-economic status (e.i. social old age), age, and hope for a further living (calendar old age). These characteristic features can but do not have to comply...“. R. L. Werner (2012, p. 117) says that the concept of old age provokes more negative than positive associations in people, mainly due to the discrimination, loss of the social role, helplessness or the need for care.

We perceive active ageing and active old age as a higher level of people's approach to their ageing and old age, which is not accompanied by passivity, but, on the contrary, by a meaningful activity (Határ, 2019, p. 97).<sup>3</sup>

The World Health Organisation understands active ageing as „a process of optimising all possibilities for ageing people to protect their health, to participate in the life of their social environment, and to bespeak their safety. In this way, ageing people can improve the quality of their lives“ (Aktiv Altern: Rahmenbedingungen und Vorschläge für politisches Handeln, 2002, p. 12). „The word active relates to the incessant participation in social, economic, cultural, spiritual and civic life. It does not mean only the possibility to stay physically active or integrated in the working process“ (Aktiv Altern: Rahmenbedingungen und Vorschläge für politisches Handeln, 2002, p. 12). The given document states that older people who are not active in the labour market or have a disability can also be actively involved in the lives of their families, peers, environment, and country.

I. Tomeš and L. Bočková (2017, p. 46) say that the *Active Ageing Index* introduced a new perception of active ageing in practice. „Active ageing refers to situations when people continue participating in the labour market in the same way they are involved in other non-paid activities (e.g. care-providing within a family, volunteering). They have healthy, independent and safe lives while they are getting old.“ The submitted index of active ageing lies on four fundamental principles: *employment; participation in society; an independent, healthy and safe life; capacity and favourable environment for active ageing* (Active Ageing Index for 28 European Union Countries, 2014, pp. 14 – 15; Tomeš, Bočková, 2017, pp. 46 – 47).

Several factors influence active ageing. The World Health Organisation divided them in the following way: *1/ health and social services, 2/ impact of behaviour, 3/ personal influence, 4/ environment, 5/ social influence, and 6/ economic influence. Culture and gender* are perceived as universal factors (Aktiv Altern: Rahmenbedingungen und Vorschläge für politisches Handeln, 2002, pp. 19 – 32). M. Petrová Kafková (2019, pp. 201 – 202) states that „when people are getting older, their activities

<sup>3</sup> To a certain extent, a mature personality with a high level of autoregulation is an assumption for self-education (Perhác, 2011, p. 95). Similarly, active ageing and active old age represent a specific „top“ of human effort (Határ, 2019, p. 97).

change according to the transformation of their preferences, limited abilities and health“.<sup>4</sup>

B. Bodnárová (2009, pp. 20 – 21) says that „bad health condition in the pre-senior age, mainly chronic diseases cause that many working people leave to disability pension or early retirement. If we want to speak about a real prolonging of working life, it is crucial to deal more with active ageing strategies and prevention in occupational and general medicine because they can improve the quality of life of younger people. At the same time, they can create health assumptions for prolonging the working life“.

„Investments into active ageing are also possible in late adulthood, and they have a potential to positively influence the course of ageing, transforming it into active ageing. Health, integration and participation mutually impact each other: health represents a necessary requirement for active participation in the labour market and voluntary involvement. Social integration and participation positively influence health, e.g. actively involved people“ (Tesch-Römer, 2012, p. 7).

## 2 Analysis of chosen research works dealing with preparation for (active) ageing, (active) old age and leaving to retirement

As we have already mentioned above, it is possible to focus on basic concepts and research dealing with (active) ageing, (active) old age and leaving to retirement within the conditions of various sciences.

Z. Kostolná (2009, pp. 27 – 29) presents the results of representative research done by *Inštitút pre výskum práce a rodiny (Institute for Labour and Family Research)*. The research aimed to find out the attitudes and opinions of employers on questions related to the participation of older employees in the labour market. 260 representatives, i. e., employees of the Human Resources Department, owners, executive directors, and authorised representatives of employer organisations, participated in this research. The research focused on the following areas:

- strategies which employers use at the recruitment of employees, and survey of possible discrimination due to employees' high age;
- treatment of older employees at work;
- attitudes and approaches of employer organisations to the lifelong education of older employees;
- employers' responsiveness to flexible forms of work organisation, working regimes and working hours in employing older employees;
- fulfilling the company's social policy concerning older employees.

Out of all acquired research findings, we choose only those results which are related to education. 68,8 % of employers think that improving education, acquiring new skills, and retraining represent a primary requirement for keeping posts and positions of older employees. 19,6 % of respondents consider further education of this group of workers as irrelevant. 11,5 % employers marked the option *other* with the reasoning that „they do not have such positions in their company that would require education or retraining, and that they need already trained people. They think that further education depends on the position and primarily skills of a particular individual“ (Kostolná, 2009, p. 43). From the mentioned research, it is evident that 64,7 % of employing organisations – small companies, enterprises and organisations-believe that further education of older employees

is irrelevant. Less than a third of medium enterprise employers and almost 6% of big enterprise employers share the same opinion. To a large extent, employers from local enterprises (88,2 %) also think that further education of older employees is unnecessary. Employers from foreign and international enterprises (in our territory) have a more positive opinion on further education of this target group of employees. Most respondents invest mainly in specialised courses and schoolings (63,5 %) for their older employees. Subsequently, there follow computer courses (35,0 %), personal development courses (20,0 %), retraining courses at work (16,5 %), education improvement (16,2 %), and foreign language courses (15,8 %) (Kostolná, 2009, pp. 44 – 45).

D. Hofäcker, M. Hess and S. König (2019) investigated the last phase of working life and leaving to retirement within German, Austrian, Swedish, and Estonian conditions. At the end of their study, they recommend that all interested parties (i.e. politicians, employers, trade unions and others) invest in the working ability of older employees and strengthen lifelong learning, further education and retraining. They also say that „bad health is one of the main reasons for early retirement, and it is valid keeping and, at best, improving the health of older employees“ (Hofäcker, Hess, König, 2019, p. 50).

Based on several theories, M. Petrová Kafková (2019, p. 204) states that „performing various activities changes as people get older, but it does not have to only decrease with the growing age. The levels of cultural, economic and social capital seem to have a crucial impact on the performance of various activities.“ The author verified these conclusions in her native Czech environment. She found out that „the idea of an ideal lifestyle significantly depends on the age, and respectively, also on the health condition. A more significant change could be seen only in the later old age. There is a strong contradiction between the idea of active spending of old age between younger respondents, and a tendency to more passive activities and spending time with others by older respondents“ (Petrová Kafková, 2019, p. 214). The author also found out that a higher economic, cultural and social capital contributed to (a higher tendency to) a more active lifestyle. The research confirmed slight gender differences in lifestyle preferences. On the one hand, women have fewer possibilities to choose relaxation as a preferred lifestyle when compared to men. On the other hand, women more frequently choose to spend time with others (the so-called gender stereotypes in the family). In our study, we consider as crucial the finding (with a relatively small difference) that „people with lower education and lower economic and social capital also have a smaller spectre of relaxing activities“ (Petrová Kafková, 2019, p. 215).

H. Engstler (2019, p. 17) dealt with older employees' planned and actual age of leaving to retirement. His research aimed to find the answer to the following questions: 1) How does the later actual leaving to retirement by older employees in Germany comply with their original plan to leave to retirement? 2) Who has a higher probability of leaving to earlier or later retirement than they initially planned? The author verified five hypotheses. The third hypothesis is crucial for the needs of our work: „Little qualified people can more seldom carry out their plan to leave to retirement than better-qualified people. On one side, less qualified employees are at higher risk to lose their working posts. On the other side, there is an assumption that, contrary to better-qualified people, these less qualified employees will stay longer at the working process than they originally planned due to financial reasons.“ (Engstler, 2019, p. 17). Based on his findings where he compared the years 2008 (a plan) and 2014 (reality), the author divided respondents into four groups or types:

1. those employees who left to retirement according to their plan;
2. those employees who left to retirement earlier;
3. those employees who continue working according to their plan;
4. those employees who worked or still work longer when compared to their plan (Engstler, 2019, p. 19).

<sup>4</sup> M. Petrová Kafková (2019, p. 202), referring to L. M. Verbrugge et al. (1996) and P. L. Klumb and M. M. Baltes (1999), divides daily activities into *obligatory, committed and discretionary* (according to the first team of authors). They can also be divided into *regenerating, productive and consumerist* activities (according to the second author team). Based on the work by P. L. Klumb and M. M. Baltes (1999), the author also states that education contributes to a higher rate of the productive activity of women. „In general, there decreases the performance of all productive and consumerist activities in later old age“ (Klumb, Baltes, 1999, Scherger et al., 2011, in: Petrová Kafková, 2019, p. 203).

To obtain the answers to the second question, H. Engstler (2019, p. 21) investigated whether „gender, health status, educational level, professional position, and the adherence to western or eastern German labour market impact the probability of leaving to earlier or later retirement than planned“. „Little qualified employees or people with a disability have a higher probability for unplanned earlier retirement. Mainly women stay in the working process longer than they planned ... The deterioration of the health condition and a threat to lose their working positions also increase the risk of leaving to earlier retirement when compared to the original plans“ (Engstler, 2019, p. 16).

The whole Slovak research by M. Koricina (2020, p. 58, 67) is also very interesting. With a sample of 242 respondents, he investigated whether companies with employees in the pre-senior age carry out education focused on the preparation for leaving to retirement. 52,1 % of respondents say that there is no pre-senior educational preparation in their companies. Up to 45,5 % of respondents do not know about this kind of preparation. The author sees the cause of the absence of these programmes of pre-senior education in their economic non-refundability and in the unwillingness of company managers to invest in the education of older employees (Koricina, 2020, p. 68).

Very interesting are also older research works, such as the research by B. Balogová (2005), B. Ráčzová and G. Marhevská (2013), or the research by J. Meszárošová, L. Wsólóvá and K. Gazdíkóvá (2017).

#### Instead of conclusion

The German authors C. Kricheldorf and S. Klott (2017, p. 437) say that the transition from the economically active age to retirement age, from partnership to „single“ life due to widowhood, or the transition from the natural home environment to residential facilities represent a process without any defined norms and rules. For this reason, people have to rely only on their resources and possibilities when going through this transition.

„Active ageing should enable people to use their potential and to bespeak their continuous social participation“ (Kolland, Meyer Schweizer, 2012, p. 590).

Since the preparation for (active) ageing and (active) old age is a lifelong process, we think it is not only an andragogical or geragogical topic. It also represents a pedagogical research topic.

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