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Active ageing: A strategic policy solution to demographic ageing in the European Union

Walker A, Maltby T. Active ageing: A strategic policy solution to demographic ageing in the European Union

The ageing of European countries has widespread implications for current and future social and economic policies across the region. The major policy response to demographic ageing that has emerged over the past 10 years is called 'active ageing', yet there is little clarity in practice about what it means for individuals and society beyond a crude economic reduction in terms of working longer. The main purposes of this article are to explain why this strategy has emerged and its importance. Despite a great deal of positive political rhetoric, the response at all levels of policy making has been rather limited. An active social and public policy is required to mainstream active ageing as the leading paradigm for ageing policy across the European Union (EU). The designation of 2012 as the European Year of Active Ageing offers a potential focus for renewed policy action in the EU and is discussed in the context of our conclusions.

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Introduction

It is now a well-known fact that (Western) Europe is one of the world's oldest populations. As Muenz (2007) pointed out, in global comparative terms, it is only Japan that shares this distinction. Both regions also share the most prominent demographic ageing trends over the next 20 years, largely as a result of the combination of declining fertility and falling death rates which, together with decreases in disease and disability, leads to increased longevity. Indeed, many European states have the lowest fertility rates and highest life expectancy rates in the world. The most recent data from the EUROPOP2010 survey estimate that the European Union (EU) population is projected to increase from 501 million on 1 January 2010 to 525 million in 2035, to peak at 526 million around 2040 but decline to 517 million in 2060 (Eurostat, 2011). Accompanying this trend, the share of the population aged 65 years and over rises from 17 per cent in 2010 to 30 per cent in 2060, with those aged 80 and over being the fastest growing age group, increasing from 5 to 12 per cent over the same period. Hence, across the EU, there has been a shift from a society that is predominantly young to one which is dominated by older cohorts. Clearly, this development has implications for future social and

public policies concerning older adults and indeed for the quality of their daily lives. It demands substantial adjustments in many aspects of society – from the family to the labour market. For example, along with the increased participation of women in employment, this is the most important change in the composition of the European labour force over the last century (Eurofound, 2010; Walker, 1997).

Historically, there has been a close association between older people and the development of 'welfare states'. This is particularly so because provision for older people in the form of public pension systems was among the first institutions in the development of welfare states at a time when this group was widely perceived as the 'deserving poor'. Pensions continue to constitute the largest items of national social expenditures across Europe and the rest of the developed world. This poses sharp policy questions about future sustainability in the face of demographic ageing. This was one of the main drivers of the Lisbon Treaty which, in 2000, established a new vision for the EU as a global competitor (see later). Because of the legacy of political campaigns for improved welfare provision, there remains a common, if slowly changing, stereotype of older people as essentially passive yet 'deserving' recipients of pensions and other forms of social care. In other words, within a European context, under contrasting Beveridge (flat rate, minimalistic) and Bismarck (earnings-related) pension systems, similar discourses about dependency in old age were part of welfare state development, although they were, and are, contingent on the broad social legitimacy of a national pension scheme (Maltby, 1994).

Under this generally negative social construction of old age, older people's economic dependency was reinforced by their exclusion from the political and policy-making systems of most European countries (Walker & Naegele, 1999). The key development here was superannuation: the expectation that older people would leave the labour force at fixed (arbitrary) ages, exchange wages for pensions and disengage themselves from formal economic activity (Townsend, 1981). Retirement also operated as a process of social and political exclusion: older people were simultaneously detached from paid work together with the main sources of political consciousness and channels of representation. This exclusion contributed to the popular perception of older people as being socially, politically and economically inactive. This then fed into age discriminatory stereotypes that portrayed older people as passive, acquiescent, family oriented and disinterested in social and political participation (Townsend, 1981; Walker, 1980).

Other factors also operated to reinforce these stereotypes of passivity in later life in the context of advanced welfare systems. For example, age was less significant than it is today: there were fewer older people, they were less healthy and retirement acted as an efficient regulator of labour force exit. Also, in political terms, old age was less salient because it was not yet perceived as an economic threat and, in any case, attention was directed at rebuilding the physical infrastructures of Europe following the 1939–1945 war and constructing the major institutions of the modern society, including the welfare state.

Across the EU, the policy responses to the unique demographic shifts being faced by all countries, until very recently, have continued to focus mainly on the first three pillars of retirement income (public, private and occupational) delivered as pensions. The fourth pillar, employment, has often been ignored in the debate about pension system sustainability as a result of the dominance of what Reday-Mulvey (2005) called the traditional life-course paradigm of education–work–retirement resulting from the core assumptions enshrined within the Beveridgean or Bismarckian welfare systems that have dominated European and national social policy for over a century. Now, however, policy makers have begun to emphasise and, arguably,

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overemphasise the importance of employment in later life. This is largely driven by fears concerning future imbalances in the labour force (i.e., too few younger cohorts) and the sustainability of pensions systems implemented during periods when retirement meant the receipt of a (state) pension for 10 years (or less) but which can now last for more than 40 years. So this new policy interest is mainly for economic reasons rather than any real change of emphasis away from existing dominant policy paradigms about old age.

At the same time, the recent growth of consumption among young and healthy older people has affected policy approaches and, in some countries at least, has enabled a switch in emphasis from poverty and dependency to activity and participation. The now universal label that is attached to this new policy discourse is 'active ageing' although its meaning varies considerably in both political rhetoric and application (WHO, 2001, 2002). In Europe, particularly in the EU, a distinctive approach to active ageing has been taking shape in recent years. Despite the cultural shift, it is the new emphasis on employment in later life that has been the main reason for the recent interest in active ageing and the fact that it has become a political priority in Europe.

The main purposes of this article are to explain in more detail why this emphasis on active ageing is emerging and why it is important. We shall then suggest that, in practice; this policy has been rather limited and that more active social and public policies are required to mainstream active ageing as the leading paradigm for ageing policy across the 27 member states of the EU. However, before active ageing across the life course as a policy response to demographic change can be fully developed, one of the major barriers to the social inclusion of older people, age discrimination, must be overcome. Yet another key question in relation to its implementation is how successfully employers can adjust to the unprecedented change in the composition of their workforces that ageing societies result in. Although our focus is a European one, the following discussion has relevance for other regions and, perhaps, particularly in North America where the concept of successful ageing still appears to hold sway over active ageing (Depp & Jeste, 2006; Pruchno, Wilson-Genderson, Rose & Cartwright, 2010).

The meaning of active ageing

The problem with active ageing, like many scientific ideas that are transported into policy arenas, is that it lacks a precise universally accepted definition. As a result, it has quickly become common currency globally and, basically, all things to all people. The dominant policy paradigm across the globe is the economistic one of working longer (OECD, 1998, 2006). In contrast, the gerontological paradigm stretches back to research on 'successful ageing' and the connections between activity and health (Rowe & Kahn, 1987). Therefore, a key purpose of this article is to propose a new paradigm of active ageing, one which reflects the gerontological heritage as well as the policy imperatives. This would demand the transformation in the traditional age-segregated life-course model of education, work and employment into a more age-integrated approach where all three span the whole life course. Before defining this new approach, we need to consider the present barriers to active ageing and how thinking around this idea has been developing over recent years.

Barriers to active ageing

The reality of the labour market experience of large numbers of older workers in most EU countries is exclusion from employment (Harper, 2006; Marshall & Taylor, 2005; Walker & Maltby, 1997). In most countries, older workers tend to occupy a relatively low status in the labour market, experience discrimination with regard to job recruitment and training and are disproportionately

represented among the long-term unemployed (Phillipson & Smith, 2006). The most common method of reducing future pension costs, raising pension ages – a policy adopted by national governments across the EU – merely emphasises and extends the exclusion experienced by older workers.

Evidence on age discrimination is difficult to piece together because much of it is hidden and indirect (Walker, 1993). Moreover, older workers claiming age discrimination are often accused of using it as a convenient excuse. In fact, when asked a direct question about it in the 1996 Eurobarometer[1] survey, very few men and women over 45 years of age (3.3 and 3.6%, respectively) said that they had experienced such discrimination in the previous 12-month period. Other evidence suggests that it is an endemic and persistent feature of European labour markets. For example, a special Eurobarometer survey (317), reporting in 2009, indicated that across the EU, 58 per cent of those questioned perceived age discrimination (ageism) to be widespread, and of all forms of discriminatory activity, ageism is the most frequently experienced (Eurobarometer, 2009, p. 71). The report suggested that these higher figures than previous years reflected the widespread anxiety engendered by the economic recession of the period and the perception that their jobs were less secure than previously. Yet, equally, it reflects the persistence of commonly perceived stereotypes. Moreover, there is no sign that the power of age stereotypes is receding, as these findings are replicated in the most recent pan-European study of age discrimination (Abrams, Russell, Vanclair & Swift, 2011).

Although the US Age Discrimination in Employment Act (1967), as amended, prohibits discrimination in all aspects of employment, including training, employers in the USA invest less in training older workers than younger ones. As in the EU, older American workers are unemployed longer than younger ones, they are more likely to be non-employed (i.e., outside of the labour force) and often experience large earnings reductions if they do find work. We know from national research studies in the EU that employers often hold stereotypical views about older workers and that these influence recruitment, training and promotion practices. For example, with regard to training, evidence from a recent UK study demonstrates that older workers have fewer opportunities than other age groups (Maltby, 2010; McNair, 2010). The 1996 European Household Panel reported that 28 per cent of all employed persons participated in training in the 3 years preceding the interviews. The highest rate (46%) was among the young employed and the lowest was for older workers (14%). In the UK, the stereotypes found to have the closest relationship with actual employment practices are that older workers: are hard to train; do not want to train; lack creativity; are too cautious; cannot do heavy physical work; have fewer accidents; and dislike taking orders from younger workers (McNair, 2010; Phillipson & Smith, 2006; Taylor & Walker, 1994).

Against these deeply ingrained stereotypes, the scientific evidence shows that older workers are, on average, as effective in their jobs as younger ones – although of course there are variations in performance between jobs (Smeaton, Vegeris & Sahin-Dimen, 2009). Older staff have fewer accidents than younger ones and are less likely to leave an organisation voluntarily. Their average net cost to an employer is similar to that of younger staff. In sum, there is a substantial body of evidence in different EU countries to show that people in their 50s and 60s (the third age) are frequently discriminated against in the labour market (e.g., Abrams et al., 2011; Drury, 1993, 1997; McEwan, 1992; Naegele, 1999; Naegele & Walker,

[1] Eurobarometer is a series of surveys regularly performed on behalf of the European Commission since 1973. It produces reports of public opinion of certain issues relating to the European Union across the member states.

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2006; Walker, 1997). Age discrimination is the critical barrier to older people's participation in the labour market and in wider society (Abrams et al., 2011). Arguably, therefore, it is the very antithesis of active ageing regardless of whether or not this is a narrow economistic version or a more comprehensive one (see later). Without action to eliminate age discrimination, active ageing policies are likely to have limited success.

Recently, the European Union Equality in Employment Directive (EC Directive 2000/78/EC of 27 November 2000) implemented the principle of equal treatment in employment and training irrespective of religion or belief, disability, sexual orientation or age. All countries comprising the EU have enacted this Directive into law, although some, such as Germany and the UK, did so after several years delay. Despite these provisions against various forms ofdiscriminatory activity, the Eurobarometer 317 survey (Eurobarometer, 2009, p. 43) indicated that:

> close to half of Europeans (48%) in 2009 believe that a candidate's look, dress sense or presentation and the candidate's age would be a disadvantage. This is followed by skin colour or ethnic origin (38%), having a disability (37%) and the candidate's general physical appearance (36%).

Concerted action is required across all EU member states to combat age barriers and to improve employment conditions to prevent both ill health and disability and, as a result, enhance the active ageing of European citizens (Ilmarinen, 2005; Reday-Mulvey, 2005). Poor health is significantly related to age and, in turn, is a cause of large productivity differences among older workers as well as premature exit from the labour market. Paradoxically, employment is both a major cause of ill health and an important source of health gain in terms of activity, self-esteem and social contact. Unless the ill health-producing and disabling aspects of employment are reduced or negated, the active ageing option will not be open to all on an equal basis, and physical and mental ageing for some will continue to precede chronological ageing. Put more positively: if the health of workers is maintained, then they will be more willing and able to extend their working lives. A preventive strategy is likely to be the only effective one, and there are plenty of examples of good practice in this respect, particularly among the Nordic countries (Ilmarinen, 2005; Ilmarinen & Tuomi, 2004). The policy of age management combined with the assessment of individual work ability (Ilmarinen, 2005; Maltby, 2011ab; Naegele & Walker, 2006) provides a clear answer to the question of how to deal with age at the workplace. For those outside the labour market, active ageing might mean active citizenship, including engagement in unpaid voluntary activity but not excluding the provision of help and support within the family.

The path towards active ageing policy in Europe

Ageing first became a 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. This was essentially an initial fact-finding mission geared towards the European Year of Older People in 1993 (Walker & Maltby, 1997). As a precursor of the issue that was later to dominate the EU discourse on active ageing, the observatory, reflecting the contemporary scientific research agenda, included the topic of employment and older workers in its research portfolio. At that time, therefore, the main policy discourse was still in the deserving or compassionate mode: older workers needed inclusion and equal opportunities. Contemporary European research began to chart a new approach which, while recognising the need for remedial action, emphasised the importance of a comprehensive preventive strategy of age management, operating

across the whole life course (Ilmarinen, 2010; Lindley et al., 2006).

The European Year of Older People in 1993 represented the first proclamation at this level of the key elements of the new active and participative discourse on ageing (Walker & Maltby, 1997; Walker & Taylor, 1993). A major theme of the year was solidarity between the generations which, since then, has been consistently promoted by the European Commission even though the responses from the member states have been patchy. The next major milestone in the development of a European discourse on active ageing was in 1999, the United Nations' (UN) Year of Older People. This decisive forward step may be seen as the culmination of the momentum that started with the 1993 European Year and which gathered power from European research on active ageing and age management, a growing global discourse and, most importantly, the now general realisation that Europe faced a huge challenge to try to reverse its early-exit labour force culture (European Commission, 2001; Kohli, Rein, Guillemard & Van Gunsteren, 1991). The European Commission's policy document and the special conference it staged on the topic of active ageing set out a radical vision of this concept and how policies to achieve it could be implemented across a broad field of national and European responsibilities (European Commission, 1999). Subsequently, however, the all-encompassing potential of active ageing was overlooked and narrowed as employment became the Commission's overwhelming focus.

The 1999 Finnish Presidency gave prominence to the ageing workforce and the employment package adopted at the Helsinki Summit emphasised the need to raise the employment rate of older workers. Since then, the dominant discourses on ageing at EU level have concerned employment, followed recently by pensions. The, now famous, Lisbon Council in March 2000 took the decisive step of establishing a 10-year strategy to make Europe 'the most competitive and dynamic knowledge-based economy in the world'. Again, the key ageing focus was on employment and, in specific terms, the strategy committed the EU to full employment by 2010. It was obvious to everyone that this ambitious goal could not be achieved unless the employment rate of older workers was raised substantially in most member states. Yet again, the European Commission has reiterated similar objectives in its current strategy, Europe 2020 (European Commission, 2011).

By 2001, when a separate guideline on active ageing was introduced, the discourse had drawn on contemporary research and policy debate and been transformed into one concerning the need for a comprehensive strategy spanning social attitudes, the maintenance of work ability, flexible employment and the optimum utilisation of the experience of older workers as a resource for business. The 2001 guideline represented a major advance because it placed the employment of older workers at the centre of the stage of EU economic development which, together with the Employment Directive mentioned earlier, created the conditions for new, more positive, discourses on ageing. Nevertheless, the policy focus was primarily an economistic or productivist one focusing on employment rather than ageing, and the concept of active ageing implemented by the EU reflected that fact. It suggested that:

> Member States should develop active ageing policies by adopting measures to maintain working capacity and skills of older workers, to introduce flexible working arrangements and to raise employers' awareness of older worker's potential. They should ensure that older workers have sufficient access to further education and training and review tax and social protection systems with the aim of removing disincentives and creating incentives for them to remain active in the labour market. (European Commission, 2001, p. 50)

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Reflecting this productivist trend, raising the employment rate among older workers was one of the key policies to achieve pension system sustainability. This understanding of active ageing perpetuates today and is fully expressed in the European Council's most recent statements on active ageing. For them:

> active ageing means creating opportunities for staying longer on the labour market, for contributing to society through unpaid work in the community as volunteers or passing on their skills to younger people, and in their extended families, and for living autonomously and in dignity for as much and as long as possible; that the continued participation of older workers, both women and men, in employment can make a valuable contribution to improving the performance and productivity of the economy which in turn is of benefit to all parts of society; that active ageing is to be regarded from the wider perspective of sustainable employability of women and men throughout the whole working life and that encouraging older workers to stay in employment requires notably the improvement of working conditions to safeguard their health and safety or the adaptation of work places to their health status and needs, fighting age and gender discrimination, updating their skills by providing appropriate access to lifelong learning and training and the review, when necessary, of tax and benefit systems to ensure that there are effective incentives for working longer. (European Council, 2010, pars 34–36, incl.)

In sum, the last two decades, with the Lisbon Treaty representing the half-way mark, have seen the evolution of a European policy discourse on active ageing which has comprised two contrasting models. First, the more dominant one emphasises a narrow economistic or productivist approach and focuses wholly or mainly on employment policy and the extension of involvement in the labour market beyond pension age. In contrast to this narrow perspective on active ageing, there is a second more comprehensive approach supported by the World Health Organization (WHO) and UN, as well as some parts of the EC, that could be articulated in the European Year of Active Ageing and Solidarity Between the Generations, 2012 (henceforth, European Year 2012).

European Year 2012

The European Year 2012 'aims 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' (European Commission, 2010). It is hoped that the year will help underline the European Commission's efforts over the 3-year period from 2011 to promote active ageing and put in place a framework in which new initiatives and partnerships supporting active ageing at all levels (member state, regional, local, social partners, civil society) can be encouraged and publicised. Although the additional focus of a European Year is to be welcomed, there lies at the heart of this initiative a limited understanding of what active ageing should be. It remains essentially a productivist policy while acknowledging the importance of the maintenance of health as crucial to continued engagement in employment. Often European policy pronouncements adopt the couplet 'healthy and active ageing' as though the two are separate activities and paradigms: they are not. Active ageing should incorporate and mutually support healthy ageing and healthy life expectancy. Clearly, the potential of active ageing is not understood sufficiently even by policy makers leading the implementation of the concept, nor the fact that its application would have short-term as well as long-term beneficial effects. Therefore, in the next main section, we outline a comprehensive strategy for active ageing.

Activage project

It is helpful as a preface to the next section to mention the Activage project which ran from November 2002 to October 2005 under the auspices of the HPSE (Human Potential and Socio-Economic knowledge base) programme (see http://www.iccr-international.org/activage/en/index.html). The project aimed, through an examination of existing active ageing policies, to: '. . . identify and analyse the socio-institutional, economic, political realities facing the implementation of active ageing policies in Europe'. The project concluded that active ageing, as the present authors argue, should be focussed upon a 'broad and comprehensive' approach to the concept, not simply through a productivist lens. By a thoroughgoing analysis of the policy responses to demographic ageing in 10 European countries, the project participants substantiate the central argument of this article that, despite the rhetoric: '. . . we are far from meeting the requirements of a substantive policy reform as foreseen by the active ageing paradigm' (Activage, 2005, p. 4).

The authors go on to suggest wholesale reforms to the three areas of policy they focus upon – pensions, labour market policy and health care – across the 10 countries they studied in order to achieve full integration. Although the Activage project findings point to the need for a comprehensive approach to active ageing of the kind advocated in this article, there is no sign, as yet, that this message has been taken on board by European policy makers.

A future strategy for active ageing

The EU level discourse on active ageing has reflected a number of influences. For example, as well as the findings of research projects such as Activage, there is the work of Reday-Mulvey and her colleagues, under the banner of the Four Pillars initiative. For several decades, they had been arguing the case for the key role of employment in funding retirement (Reday-Mulvey, 2005). The most important external influence was the WHO's multidimensional approach to active ageing. Although, not surprisingly, this has a specific focus upon health, the WHO does take an extremely broad view of 'health'. Thus, according to the WHO (2002, p. 12), active ageing is:

> the process of optimising opportunities for health, participation and security in order to enhance quality of life as people age. Active ageing applies to both individuals and groups. It allows people to realise their potential for physical, social, and mental well-being throughout their lives and to participate in society according to their needs, desires and capacities, while providing them with adequate protection, security and care when they require assistance.

This WHO policy represented the culmination of a long process of deliberation and discussion with inputs from a variety of scientific and policy perspectives. It has made two important contributions to European (and global) discourses on active ageing. It added further weight to the case for a re-focussing of active ageing away from employment and towards a consideration of all of the different factors that contribute to well-being. Specifically, it argued for the linkage, in policy terms, between employment, health and participation. Along similar lines, it emphasised the critical importance of a life-course perspective. In other words, to prevent some of the negative consequences associated with later life, it is essential to influence individual behaviour and its policy context at earlier stages of the life course.

The WHO approach also contributed to the growth of the discourse on older people as active participants in society that had been present at the European level since the 1993 Year of Older People, and which was boosted by the European activities in the UN Year of Older People in 1999. The theme of older

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people's right to participate, as well as the key policy of active ageing, was further reinforced by the 2002 UN Madrid International Plan of Action on Ageing (MIPAA). The MIPAA gave prominence to active ageing as a strategic global response to population ageing and this is reflected in the UN Economic Council of Europe's Regional Implementation Strategy (United Nations, 2002).

Despite the presence in the EU, for nearly a decade, of the conceptualisation of active ageing based on participation and well-being across the life course, the actual policy instruments still focus primarily on employment, as we have seen. Why has this comprehensive approach so far failed to take root in EU policy when the European Commission itself made a substantial contribution to framing it? Several explanations may be suggested. One possibility is that it may simply be a case of the time lag involved in developing and implementing any comprehensive policy approach, and the echoes of the 1999 EC paper found in the 2006 one perhaps are a sign of this. However, this could be wishful thinking because post-Lisbon, 'full' employment remains a central goal of the EU, and is now continued robustly within the 2011 'Europe 2020' strategy. While, in theory, this priority is not incompatible with a comprehensive strategy on active ageing, in practice, the focus on employment tends to exclude other aspects; furthermore, the policy instruments available at the EU level do not lend themselves to its implementation.

A key problem lies in the competencies of the EU in policy making. In practice, it is the sovereign member states that are responsible for employment and social protection policies, while the role of the EU is confined to coordination and the encouragement of good practice. The main policy instrument in this regard is the Open Method of Coordination (OMC) by which member states report annually on progress towards commonly agreed goals. This is 'soft' policy making because there are no formal sanctions. Thus, even when a guideline on active ageing was introduced into the OMC in 2001 (as noted earlier), the only force behind it was exhortation. Similarly, although the 2000 Employment Directive is 'hard', law-based policy, its enactment and enforcement lay at national levels. Despite these weaknesses in EU policy competencies, it would be helpful, at least to the promotion of active ageing, if there was common agreement within the EU about what the policy is trying to achieve, but there is none. Moreover, the economic policy interests within the Commission usually outweigh the social policy ones. It is symptomatic of this imbalance that the active ageing guideline is an employment one. The unfortunate result of this artificial limitation of the active ageing paradigm in Europe is that opportunities are being missed to derive benefits, for both citizens and governments, from a more joined-up approach.

To comprehend both the scope and potential of active ageing, it is necessary to outline what a comprehensive strategy would look like and the principles upon which it should be based. The foundation for this strategy exists already in European and WHO documents (European Commission, 1999; WHO 2001, 2002). By emphasising the health and well-being aspects of active ageing, this body of work represented a paradigm shift away from the 'productive ageing', one that had previously been prominent in the global discourse on ageing. Although some interpretations of productive ageing are broad in scope (Bass, Caro & Chen, 1993), unfortunately, the majority focus narrowly on the production of goods and services and, therefore, lack the emphasis on the life course and well-being found in the active ageing paradigm. When the Organisation of Economic Cooperation and Development (OECD, 1998, p. 14) tried to combine these two paradigms, the result begged more questions than it answered. While the WHO conception naturally prioritises health, the 1999 European one placed more emphasis on participation and well-being. Furthermore, it is wrong to assume that the process of active ageing

exits in practice. Active ageing should be seen, rather, as an aspiration:

> a comprehensive strategy to maximise participation and well-being as people age. It should operate simultaneously at the individual (lifestyle), organisational (management) and societal (policy) levels and at all stages of the life course. (Walker, 2002, p. 130)

Seven key principles have been advanced as the basis for a strategy on active ageing to ensure that it is both comprehensive and consistent (Walker, 2002, 2009). The first of these principles is that 'activity' should comprise all meaningful pursuits that contribute to the well-being of the individual concerned, his or her family, local community or society at large, and should not be concerned only with paid employment or production. So volunteering should be as valued as paid employment. Furthermore, maintaining and regaining mental capacity are as important as physical activity (FUTURAGE, 2011). Secondly, it should be primarily a preventive concept. This means involving all age groups in the process of ageing actively across the whole of the life course. Because of the importance of this life-course dimension, active ageing should encompass *all* older people, as well as younger age groups, even those who are, to some extent, frail and dependent. This is because of the danger that a focus only on the 'young-old' will exclude the 'old-old' and the fact that the link between activity and health (including mental stimulation) holds good into advanced old age (WHO, 2001). Next, the maintenance of intergenerational solidarity should be an important feature of active ageing. In simple terms, this means fairness between generations as well as the opportunity to develop activities that span the generations. The concept should embody both rights and obligations. Thus, the rights to social protection, lifelong education, training and so on should be accompanied by obligations to take advantage of education and training opportunities and to remain active in other ways. Any strategy for active ageing should equally be participative and empowering. In other words, there must be a combination of top-down policy action to enable and motivate activity, but also opportunities for citizens to take action, from the bottom up, for example, in developing their own forms of activity. Finally, active ageing has to respect national and cultural diversity. For example, there are differences in the forms of participation undertaken between the North and the South of Europe; therefore, value judgements about what sort of activity is 'best' are likely to be problematic.

These principles suggest that an effective strategy on active ageing would be based on a *partnership* between the citizen and society. In this partnership, the role of the state is to enable, facilitate and motivate citizens and, where necessary, to provide high quality social protection for as long as possible. This will require interrelated individual and societal strategies. As far as individuals are concerned, they have a duty to take advantage of lifelong learning and continuous training opportunities and to promote their own health and well-being throughout the life course. As far as society is concerned, the policy challenge is to recognise the thread that links together all of the relevant policy areas: employment, health, social protection, social inclusion, transport, education and so on. A comprehensive active ageing strategy demands that all of them are 'joined-up' and become mutually supportive. The primary discourse behind this strategic vision of active ageing is the UN's one of a society for all ages (see http://www.un.org/ageing/society.html).

With regard to the scope of the actions necessary to achieve such a comprehensive strategy, the WHO has highlighted eight main determinants of active ageing: culture and gender (both of which are cross-cutting), health and social service, behavioural factors, the physical environment, the social environment, economic determinants and those

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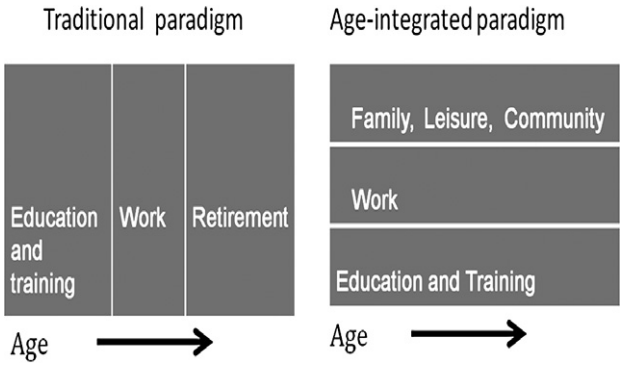

Figure 1. Paradigms of ageing.
Sources: Reday-Mulvey (2005) and Riley & Riley (1986).

related to the person concerned (such as biology, genetics and psychology) (WHO, 2002). In EU policy terms, this would mean linkage between policy domains that have hitherto always been separated: employment, health, social protection, pensions, social inclusion, technology, economic policy and research. Research and development have a critical role to play in advancing the active ageing agenda in Europe and, especially, in providing the evidence base for policy. European research, under Framework Programmes 5 and 6, has already added considerably to this knowledge base and the future research priorities have been mapped by, for example, the European Technology Assessment Network (1998) initiative and coordinated actions like FORUM and ERA-AGE (http://era-age.group.shef.ac.uk/). In the current EU deliberations about the future of European research (e.g., FUTURAGE (http://www.futurage.group.shef.ac.uk/) and Why We Age (http://www.whyweage.eu/), it is vital that ageing figures prominently and, moreover, that the well-being of an ageing population is a central aim of research and development.

Critically, in order to facilitate a comprehensive active ageing approach, there has to be a paradigm shift in the societal understanding of the life course (Reday-Mulvey, 2005; Riley & Riley, 1986). This would involve a departure from a 'traditional' life-course model consisting of three distinct phases of the lifecycle (education, work and retirement) to a more horizontally distributed one called 'age integrated', and involve the three milieus of work, education and leisure, family and community (see Figure 1). This would encourage a life pattern that is at once more diversified, more flexible, and more dynamic and where responsibilities and benefits are evenly apportioned between men and women (Reday-Mulvey, 2005, p. 22).

Conclusion

This article has examined the emergence of discourses on ageing at the EU level and, in particular, has concentrated on those concerning the increasingly universal policy concept of active ageing. It has noted that the concept was rooted in the new politics of old age that began to take a recognisable shape during the 1980s. This led the transition from the perception of older adults as largely passive recipients of welfare to a more active political orientation among older people, which was encouraged by policy makers at both local and national levels, for example in the form of 1993 European and 1999 UN years. In particular, the outline of a new approach to active ageing by the EU in 1999 provided a radical statement about its potential to, on the one

hand, reflect the discourses arising, bottom-up, from older people and being reinforced by those with scientific expertise in health and well-being and ageing while, on the other, those coming, top-down, from policy makers concerning the economic sustainability of the EU's social protection systems. In other words, active ageing is that rare policy concept that can unify the interests of all key stakeholders: citizens, non-governmental organisations, business interests and policy makers. This is not to suggest that the active ageing strategy proposed here is foolproof. There are real dangers that policy makers and practitioners will overemphasise physical activity to the neglect of mental capacity and, in their enthusiasm, over-idealise a particular model of ageing. This could result in some groups, such as frail older people, being excluded (Ruppe, 2011) by prescriptions that are clearly intended only for the already active. This would, by the way, be a paradoxical position for policy makers and practitioners in the ageing field to find themselves in because they are more used to being warned of the dangers of creating dependency (Townsend, 1981). Adherence to the implementation principles set out earlier will minimise these risks. The greatest danger, however, lies in the present productivist straightjacket within which the active ageing concept is confined.

The paradigm of active ageing proposed in this article consists of a comprehensive approach to the maximisation of participation and well-being as people age and one that, ideally, operates simultaneously at the micro, meso and macro levels. It would facilitate the development of the age-integrated approach mentioned earlier. Comprehensiveness and consistency would be ensured by policies that reflect the seven key principles we have advanced. These reflect the need for a partnership between the citizen and society if the comprehensive, lifelong paradigm of active ageing is to be realised in a non-coercive fashion and in ways that do not make some groups feel excluded. Thus, individual responsibility should be matched by policy action to connect all of the potential supports for active ageing that are usually separated into different administrative departments. Joining up separate policy areas, such as employment, health, pensions and education, is a prerequisite for realising this comprehensive approach as well as for the creation of a society for all ages. This strategy to promote active ageing would not only provide a response to workforce ageing but would also go a long way towards relieving pressure on Europe's social protection systems – by reducing the costs associated with early exit, by extending working life and by reducing health care costs. It would also be in tune with the aspirations of ageing workers for more flexibility in retirement (Smeaton et al., 2009) and it would help to enhance and extend the quality of life of older people in retirement. The European Year 2012 is an opportunity for such an agenda to be advanced across the EU, but we must wait to see if this will be achieved.

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