

Third Age Policies and Active Ageing in Portugal: 2005-2010

Esmeraldina Costa Veloso

University of Minho, Portugal

eveloso@iep.uminho.pt

Introduction

The present work aims at the analysis of the public policies for third age and adult education in Portugal and ascertain how and to what extent the right to education is guaranteed in the case of elderly adults. The analysis takes into account the influences from the European Union and other international bodies in terms of Active Ageing.

1. The Lisbon Strategy and the public intervention to the elderly (2005 to 2010)

This period is characterised by international *norms* issued by international and supranational agencies that influenced national policy in different areas, namely policies aimed at the elderly promoting active ageing and other programs that aim at the promotion of social cohesion in this age group.

Within this context we find relevant to take into account the directions that have been set out by the European Union in terms of the strategies for active ageing, social health protection and inclusion, in order to understand in sociological terms the political rhetoric in the area of public policy for the elderly as well as what has been done in this field in Portugal.

1.1 Employment, active ageing and social cohesion in the European Union

It is worth noting the concern of the European Union with the consequences of demographic ageing and workforce, sustainability of the welfare system and circulation of older workers since the inception of the 90's. However, we consider that this concern has grown over time and resulted in employment strategies in the European Union, amongst other policies, consubstantiated also in terms of active ageing and aimed at all member states by the end of the 90's (Veloso, 2011).

This way, in the analysis of the European Council of Lisbon that took place in March 2000 and also known as the Lisbon Strategy, we consider relevant a central objective that will influence subsequent councils, in particular the interventions aimed at the older population. The goal is the intention of the European Union to become the most competitive and dynamic economy in the world, based on knowledge and sustainable economic growth with better jobs and a strong social cohesion. However, together with this goal, the European Union faces a serious problem in the ageing of its population, giving rise, among other things, to the strategy of active ageing. If we take into account the data provided by the European Union, we come to the realisation that Europe is the continent with the most pronounced ageing, be it because of the drop in birth rates or because of the increase in longevity. In this scenario, populational ageing is a hindrance to this economic and political goal as it was defined in Lisbon in 2000, because the work force is old. However, there is also another problem, the weight on the social welfare systems of an increase in the number of old age pensions payed and the deficit in the active workforce to support this expense. Therefore, to solve these difficulties, the European Council put forward in March 2001 in Stockholm, a goal in which the population over 55 years of age should remain more time in the workforce so that, up to 2010, half of the population in the age bracket between 55 and 64 years of age remained working. In addition to this goal raised in Stockholm, the European Council defined in March 2002, in Barcelona that the exit age from the workforce should be increased by 5 years until 2010.

1.2 Third Age Policies in Portugal: 2005 to 2010

In Portugal, the international standards emanating from international and supranational agencies such as the European Union, have been influencing national policies in several sectors, namely the policies directed at the elderly with emphasis on active ageing and other programs that aim at social cohesion for this age group.

More specifically, this can be illustrated by the government's working document entitled "Estratégia Nacional de Envelhecimento Ativo" (National Strategy for Active Ageing) where three intervention priorities are established: Priority 1 – Stimulate older workers to remain in the workforce; Priority 2 - Value and promote the knowledge of older workers; Priority 3 – Prevent and avoid unemployment amongst older workers (Plano Nacional de Emprego, 2006).

Different programs were then developed to implement each of these priorities. Priority 2 is of particular interest to us as it aspires to value and promote the knowledge of older workers, amongst other aspects. The operationalization of these objectives are included in Iniciativa Novas Oportunidades (New Opportunities Initiative) and will be discussed in the next paragraph dedicated to adult education policies.

Apart from this document, there is also the Programa Nacional de Ação para a Inclusão (Inclusion Action Support National Program) that aims at promoting social cohesion, eradication of poverty and social exclusion, also inline with the European Union goals and objectives. In this regard, the following programs and actions were implemented:

- Programa de Alargamento da Rede de Equipamentos Sociais, PARES (Program for the Broadening of the Social Equipment Network);
- Programa de Apoio ao Investimento em Equipamentos Sociais, PAIES (Investment and Social Equipment Support Program);
- Programa Conforto Habitacional para Pessoas Idosas (Housing Comfort for the Elderly Program);
- Complemento Solidário para Idosos, CSI (Solidarity Complement for the Elderly); and
- Rede de Cuidados Continuados Integrados (Integrated and Continued Care Network)

In brief, many measures were implemented that took into consideration the level of poverty, the physical condition as well as the precarious social and economical conditions that many Portuguese elderly lived. It is unclear however, if these measures were able to reach all the elderly in these conditions and even for those who were, if the measures were able to address their multiple needs.

However, one can conclude that there is the intention to privilege the intervention next to the elderly in the areas of social action and health. These are areas which are extremely important when dealing with poverty, social exclusion and sickness lived by many elderly, but keeping in mind that the measures may not address all these problems.

Within this context and taking into account all the programs undertaken, we observe the lack of a global and integrated public policy for the elderly that promotes the measures

that take into account the ever increasing diversification and complexity of the living conditions of the elderly; such as poverty, access to retirement, health issues, housing, education, amongst others, with emphasis to the need to protect the rights of the elderly.

Therefore, we will analyse next the application of the education public policies for the elderly in Portugal., especially in the last years, in the hope that will help clarify what has (not) been done in this area in particularly towards the elderly.

3. Adult Education Policies in Portugal (2005-2010)

As the XVII Government took office, some changes in the field of adult education came into existence in Portugal. Therefore, from 2005, the different activities under the umbrella of the former National Education Agency and Training of Adults¹ become part of the Initiative and New Opportunities², a body that since 2006 is under the control of the National Agency for Qualifications³ and in turn under the Department of Education⁴ and the Department of Employment and Social Solidarity⁵. The Initiative and New Opportunities is structured along two main axes: the first axis has the youth as its recipient and aims at the qualifications of the young. The second axis deals with the elderly and their qualifications.

No matter what axis, the major concern is the qualification and it is no coincidence that the coordinating body of the Initiative and New Opportunities is named “National Agency for Qualifications”. This concern with qualifications of the Portuguese population must be taken within the frame of the directives of the European Union, in particular the Council of Lisbon, in which the goals set for the future of the European Union took the form of the goal to build the most competitive economy in the world and promote social cohesion. The emphasis in qualifications can also result however in the exclusion of certain groups of adults from training and education programs, because they are not part of the active population or, even if they are still active, they are no longer eligible because of their old age.

Actually, we must keep in mind that the goal of postponing the exit from the workforce and increase the number of workers with ages between 55 and 65 years of age has implications in the investment in education and training programmes as noted in the working document of the National Strategy for Active Ageing⁶. One of the priorities is exactly the promotion and recognition of the knowledge of the older workers aiming at their own education and training. To reach this goal, the Initiative New Opportunities is mentioned, stating that “access to Long life Education and Training systems by older and less qualified workers should be enhanced (...)” (National Strategy for Active Ageing, s.d., p. 22).

To analyse the participation of older adults, we checked information posted on the government website relative to the number of adults that attended programmes under the umbrella of the New Opportunities Initiative. This way we observed that the

¹ [Translation Note] In the original Agência Nacional de Educação e Formação de Adultos (ANEFA)

² [Translation Note] In the original Iniciativa Novas Oportunidades

³ [Translation Note] In the original Agência Nacional para a Qualificação

⁴ [Translation Note] In the original Ministério da Educação

⁵ [Translation Note] In the original Ministério do Emprego e da Solidariedade Social

⁶ [Translation Note] In the original Estratégia Nacional de Envelhecimento Activo

participation by people 65 years of age and older is just 1% and this number is relative to attendance of primary education. From 45 years of age onwards we observe a marked reduction in the percentages of participation of these adults. In detail, the percentage that attends primary is 35% in the bracket 35-44 years of age, 19% for the population between 45 and 54 years of age and 4% for those between 55 and 64 years of age. Therefore, the Initiative and New Opportunities has targeted a younger audience.

From all we have discussed, it seems that there is a continued lack of an integrated global public policy aimed at different adults both active and inactive as well as educational activities promoting and building citizenship. This indicates the public policies for adult education are limited in terms of the population that comes under the proposed goals they target; failing to put in practice the universal policy notion as far as the target public is concerned. To take into consideration the right of the elderly to education implies a notion of permanent education, as put forward by the Faure Report, as well as a notion of adult education that is global and all-encompassing and, in turn, a means to realize that ideal of permanent education. (Faure *et al.*, 1974).

This ideal concept of permanent education, education during one's life, has been changing and in its place the new emphasis is now shifted to life long learning, a concept circulated amongst international agencies, such as the European Union, demonstrating the new relevance given to the vector education-workforce, instead of the old education-democracy-citizenship. The emphasis on learning also implied a change in the role of the State where it is no longer the main party responsible for the delivery in terms of social policies, as in the social democrat model according to Griffin (1999), but is now stimulating the involvement of the civil society in the promotion of different services that were previously government run.

Final Reflection

We question the rights of the elderly in a context that lacks a global public policy for the third age as well as a global policy for adult education and we believe that those rights are not guaranteed, especially the right to education. Therefore, there is the need to rethink the role of the State to guarantee the elderly the right to education.

References

- Faure, E. (Coord.), Herrera, F.; Kaddoura, A.R.; Lopes, H.; Petrovski, A.; Rahnema, M. & Ward, F.C. (1974) *Aprender a Ser*. Lisboa: Livraria Bertrand.
- Griffin, C. (1996) "Life Long Learning and Social Democracy". *International Journal of Lifelong Education*, Vol 18, n.º 5, pp. 329-342.
- Iniciativa Novas Oportunidades: www.novasoportunidades.gov.pt, 22/6/2009.
- Plano Nacional de Emprego (2006). *Estratégia Nacional do Envelhecimento Activo*. www.calameo.com.
- Veloso, E. (2011). *Vidas Depois da Reforma*. Lisboa: Coisas de Ler.