

# ACTIVE AGEING: THE NEW TYPE OF ELDERLY ON THE LABOR MARKET-THE NEW PERSPECTIVE OF THE KNOWLEDGE SOCIETY AND ECONOMY

**Cornelia DUMITRU**

Institute of National Economy

Romanian Academy

## **Abstract:**

*The demographic changes during the last decade of the 20<sup>th</sup> century that continued also at the beginning of the new century represent one of the major concerns for a complex mix of actors: politicians, economists, sociologists, physicians, etc. The phenomenon of accelerated aging at European level where there are already regions and areas regarded as 'grey' poses issues of economic, social and ethical order. At the same time, the new generations of elderly are faced with an entirely new set of issues: the requirements of the European policies which regard active ageing as the best answer to the demographic deficit and to more areas changing into 'grey'; the risk of pensions which from the perspective of the pensions' funds become unsustainable under these circumstances; the inherent differences between the developed and developing countries (and frequently still in transition) of Central and Eastern Europe, so that also in this field mentions were made about a "two-speed Europe". The categories of elderly still active on the labour market are and shall become increasingly diverse. The knowledge society and economy based on the ICT progress already heralds the new type of elderly found more and more frequently on the labour market: the educated and skilled elderly who, even though a "digital immigrant" is well trained and capable of putting to good use his/her knowledge, experience and skills accumulated during the entire lifetime. Yet, for this to become true, it is necessary to combine several multidisciplinary, systemic and integrated approaches that on one hand would ensure the increase in the numbers of elderly and retired individuals making frequent and large-scale use of the benefits brought by the technological progress, and on the other hand to contribute in diminishing negative perceptions and discrimination with which these elderly persons are faced.*

## **1. Brief review of main concepts and issues**

Socio-gerontology of the years forty and fifty of the 20<sup>th</sup> century laid the backbone for the concept of "active ageing" by the studies dedicated to the important role played by an active life style for elderly [Lynott, R.J. and Lynott P.P, 1996]. Thus, the bases were created for the "activity theory" in an environment penetrated by controversies related to the advantages and disadvantages of an active life for elderly. It was argued that keeping active,

the combination of physical and mental activities for keeping fit and maintaining involvement in the social life are all meant to ensure a third and fourth age under optimum conditions.

Among those contesting this option, ground is gained in parallel by the “*disengagement theory*” [Cummings, E and Henry, W.E. 1961] which drew attention to the fact that ageing as universal and inevitable process implies the withdrawal from active life and gradual but certain disconnection of individuals from the active life and from society, in general.

The well weighted arguments pursuing the achievement of a balance between these two trends of thinking started with the ones related to health, to vulnerabilities and the diminishment of (physical and mental) capabilities of the elderly, and continued with the arguments supporting the extension of the active life period but in correlation with the existence of some good health care services, maintaining that this would be a direct contribution not only to increasing life-expectancy in general, but also the period in which the individual remains longer in the active life and has beneficial effects for the general development of the society.

During the seventies and the eighties of the previous century, the public policies’ trend was to promote early retirement as mitigating solution to unemployment of the youths in several Member-States of the European Community (nowadays the European Union). But, the demographic realities led to the gradual replacement of this trend with the one of promoting “productive ageing” and “healthy ageing”. This process of contrary sign turned increasingly more important by the end of the eighties and became the mainstream of the years ninety, last but not least as expression of the concerns related to demographic changes which made more and more regions to turn into true “grey zones”.

By the end of the nineties, the World Health Organizations (WHO) adopted the term of “active ageing” contributing significantly to the swift adoption and dissemination of the term at global level. In the WHO definition and conception, “active ageing” represented “optimizing opportunities for health, participation and security in order to enhance the quality of life as people age”.

Thus, the end of the nineties meant also a qualitative leap in the way in which elderly are regarded, in general, and in particular elderly who are still active on the labor market. The immediate answer, at institutional level, came by formulating new policies, measures and initiatives aimed to a more consistent involvement and to maintaining them for longer periods of time as before in the active life, and respectively in the labor market.

From the viewpoint of economic development, the current stage of the information and knowledge society is, in the opinion of many experts,

the most favorable for operating changes and transitions in the field of strategies, policies and initiatives aimed at elderly and at the role they can play in the active life. Moreover, it marks the definitive departure from the concept of “deficit” related to physical capabilities (and sometimes even mental ones) of the elderly, from the idea of their “disengagement” and “detachment” from the active life and to more strengthened ideas related to evaluating and putting to good use the experience and competence gains of elderly, to encouraging the processes of lifelong learning despite age for improving opportunities of remaining longer in the economic and social life, but also as a means for combating the mental “deficits” associated with advanced (and even old) age in the past.

### **1.1 Classifying approaches related to active ageing**

Active ageing from the time the concept was coined underwent several stages of conceptualization and the process of changing and even enriching the concept still continues nowadays.

Obviously, due to the economic component which is significant as weight and which contributed decisively to imposing and enhancing the term in the last decades of the 20<sup>th</sup> century and in the first decade of the current century, there is a first approach focusing exclusively on this component.

This *unidimensional approach* which deals with elderly exclusively from the perspective of their impact on labor market and on the social insurance systems (from the time of early retirement or of legal retirement age), hence on public finances in general, is the most represented one both in the specialized literature, and in the punctual policies of the EU-28 member-states’ governments, but also at global level. Thus, developed countries, but also transition and developing countries of EU-28, emphasis is laid on the combination of policy mixes that on one hand would ensure the extension of the active life, and on the other hand would provide for the health-care and social assistance systems that can contribute directly or indirectly to obtaining the envisaged outcomes<sup>1</sup>.

Yet, the defining element of this unidimensional approach is the way in which is pursued the promotion of active ageing, respectively: (i) advocating in favor of some policies that would extend the period of active life by increasing the retirement age and restricting the conditions to be met by elderly on the labor market who could benefit from early retirement schemes; (ii) measures aimed at increasing the attractiveness of elderly for

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<sup>1</sup> Clarke A. and Warren L. 2007. Hopes, fears and expectations about the future: what do older people's stories tell us about active ageing? *Ageing & Society*, 27, 4, 465–88.

employers by initiatives that combat in particular discrimination of elderly on the labor market<sup>2</sup>.

The true deficiency of this approach is the emphasis laid only on the component “active on labor market” meant as “remunerated activity” without considering the broader understanding as formulated by WHO which emphasizes that this “active ageing” exceeds this narrow framework and implies also active presence also from social, civil involvement and cultural viewpoint. Therefore, automatically, this approach excludes certain categories:

- active elderly but who cannot be found in remunerated activities;
- individuals excluded due to some severe physical impairments;
- elderly who – in the absence of continuing training or up-skilling measures and to recent complex evolutions on the labor market – cannot identify a new job because of the changed requirements of the workplace, thus being affected by labor market displacement;
- elderly who before searching for a new job were active in a demanding and/or hazardous sector where there were (possibly) also health risks that diminish their attractiveness for potential employers, etc.<sup>3</sup>

Obviously, these types of exclusion, and even of exclusion inside exclusion, are distributed evenly within both trends (early retirement schemes restrictions and increasing the retirement age and increasing the attractiveness of elderly in the labour market) which draws attention on the necessity of a more integrative and inclusive approach of the active ageing process within the dedicated policies.

Moreover, this approach cannot provide for complete answers for retired individuals who for maintaining their optimum physical and mental condition, but also for avoiding sudden shift to a complete ‘disengagement’ stage from the community life should benefit from complex, integrated systems of “assisted living”, but which would allow for frequent interaction not only with family and careers, but also with the community where they developed their active life, thus maintaining also social and cultural links with the outside world.

A possible reply was searched by the *multidimensional approach* which emphasized on one hand the importance of *productive economic activity* but associating it with *productive social activity* by which elderly

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<sup>2</sup> ActivAge Consortium 2005. *Overcoming the Barriers and Seizing the Opportunities for Active Ageing Policies in Europe* Final report, European Commission, Brussels

<sup>3</sup>Boudiny, K ‘Active ageing’: from empty rhetoric to effective policy tool <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC3728916/>

still active on the labor market who intend to extend their period of active life are those also providing for the society social value added by their accumulated knowledge and experience. The point of inflection in this approach is the mix of economic, social and medical components as presented in an index in which attention is drawn on the necessity of including this mix in the policies aimed at elderly. The five indicators considered as essential are: paid activity, voluntary assistance and work, sports, and leisure time activities<sup>4</sup>.

To the largest extent, the approaches of EU-28 level can be found in this multidimensional framework because according to the promoted policies active ageing is associated with extending the active presence on labor market, developing paid activities, involvement in lifelong learning processes, continuing on an active and involved path even after reaching the retirement age, by further pursuing learning activities and participation to the life of the community, active involvement also after retirement in activities and occupations that promote maintaining the physical and mental capabilities, active engagement in health and old age quality of life assurance.<sup>5</sup>

Another aspect worth mentioning is that still both approaches focus, predominantly, on elderly falling within the first category, respectively on third-age elderly and less on fourth age elderly, for whom the progress of inherent degenerative processes, with consistent cognitive and physical losses means not only a diminishment in the capabilities but also of the personal wish of social involvement.

For this last category, for whom are the more relevant social activities on a small scale, and the exclusive use of time for recreational and leisure activities in small circles of individuals, without any involvement in voluntary activities or in caring for grandchildren (who could well be already in their teens or fully grown up), it is necessary to implement another type of specific policies meant to maintain and even improve the last period of their lives.

A first conclusion, based on the two approaches, to which we limited ourselves in the present paper, is that despite of the proposed efforts and delimitations there still is no unitary definition and view – either European or global – about the concept of active ageing and its complements “productive ageing” and “healthy ageing”.

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<sup>4</sup>Houben M., Audenaert V. and Mortelmans D. 2004. Vrije tijd en tijdsbesteding [Leisure and time allocation] In Jacobs T., Vanderleyden L. and Boer Vanden, L. (eds), *Op latere leeftijd. De leefsituatie van 55-plussers in Vlaanderen*. Garant, Antwerp, Belgium, 225–52.

<sup>5</sup>Oxley H. 2009. *Policies for Healthy Ageing: An Overview* Organisation for Economic Co-operation and Development (OECD) Health Working Papers No. 42, OECD Publishing, Paris

## **1.2 The knowledge society – as opportunity for harmonizing perspectives and improving policies aimed at elderly**

Active ageing, encouraged as a result of the worrying demographic changes of the last half of the 20<sup>th</sup> century, can benefit from new incentives and innovative approaches due to the technological progress and to the information and digitalized technologies' penetration in all economic, social and cultural sectors. Several of the obstacles in front of an active and healthy ageing were diminished and even removed as a result of shifting to a superior level of economic and social development – the knowledge stage.

The European Commission emphasized already in 2007 that *“Information society can enable older people when and where they wish to do so to participate fully in society and the economy, and to be active as empowered citizens; and at the same time generate benefits for the economy and society at large* [European Commission, June 2007].

Putting to good use the potential resulting from technological progress is the more important as the current “demographic revolution” shows that up to the year 2050 the group of elderly shall represent approximately 33% of the European population leading to GDP expenditures for pensions, health and long-term care increased by 4% up to 8%<sup>6</sup>, which signifies a tripling of expenditures<sup>7</sup>.

The impact is the more significant if we consider this phenomenon as relevant at global level, thus making the integrated, systemic and networked multidimensional approach of demographic ageing into one of the most pressing issues on the Europe 2020 Agenda.

Yet, for achieving the objectives of such a complex approach several obstacles must be overcome, from national strategies and policies, to practical implementation of these policies, actions and measures.

It should be emphasized that in this context, taking into account also the various development levels of the EU Member-States, and even the various development levels of the regions of the respective Member-States (especially in the case of the old cohesion and convergence Member-States and in the New Member States) is a decisive factor in ensuring the successful implementation and realization of the European options with respect to active ageing.

The main difficulties to which adequate answers should be found, inclusively by the developed Member-States are:

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<sup>6</sup> European Commission, 2007: Active Ageing in the Information Society, Position Paper

<sup>7</sup> European Commission, June 2007; Ageing well in the Information Society, <http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52007DC0332:EN:NOT>

- The reluctance shown by many elderly in learning new ways of “doing things”, including here the use of PCs, laptops and other devices brought along by the “digital/information era”. Recent studies have shown that only 10% of the elderly aged 65 and over make use of the internet, which is explicable to a certain extent due to the fact that more than 20% of those aged 50 years of age and over have hearing, seeing and dexterity difficulties (impairments).
- Learning skills and competences that allow for using computerized technologies requires a previous predetermined set of skills and competences because in spite of the massive simplification of programming and soft systems that ensure access to these technologies many of the individuals aged 50 and over are reticent and regard “entering” into this field as a challenge.
- On the product and services’ market there still are not products and services aimed specifically to this category of individuals with respect to design, functions, ease of use and technologies that take into account the requirements and necessities of this group of persons. Moreover, the absence of awareness about the existence of this niche for digital products and services has led to the fragmentation of the research and innovation efforts in this respect.

Still, it should be emphasized that active ageing is the concept which by a multidisciplinary, integrated and systemic approach can best help individuals aged 50 and over, and the ones aged 60 and over who plan to be still involved in active life, on the labor market, but also in the social and cultural life to put to best use their resources.

Thus, for remaining active for an extended period of time on the labor market, ITC can assist these individuals in:

- fulfilling tasks and activities in an adequate, accessible and productive manner;
- ensuring increased quality in the delivered activity/work;
- meeting the demands of the job without sacrificing the work-leisure balance.

Also, for already retired individuals ITC can eliminate many of the risks of isolation, can ensure much easier access to public services they need at any given moment, facilitates the ways in which elderly can maintain their social contacts (own ‘social networks’), together with providing for increased opportunities of optional and voluntary involvement in actions/initiatives at the level of community if elderly wish and can get

involved according to their (physical and mental) abilities and to their availabilities.

Additionally, ITC can provide for better safety at home, an a quality of life that assists in extended life spans, swift medical assistance, when and if necessary (e-health and tele-medicine), strengthening thus their confidence in own forces, and ensuring implicitly conditions for maintaining independence, autonomy and dignity in old age.

## **2. Main trends at European level and in Romania**

At European level, the multidisciplinary, systemic and integrated approach of active ageing policies is coordinated on three main axes in the new context provided by the knowledge society and economy: (i) inclusion, facilitating access to public services and ensuring a better quality of life for elderly; (ii) an information society accessible to all, including elderly; (iii) research-development and innovation activities linked to investments for putting to good use a market niche yet insufficiently harnessed by the business environment. The mix of these three coordinates aims to the main aspects of adjusting to the changed circumstances in which the generations of elderly will be increasingly more present in the economic, social and cultural life at European level. Additionally, on these coordinates can be identified ways for ensuring a better quality of life for elderly, for their families and careers, and for assuring the sustainability of the pensions' systems, of health-care and social insurance services'. Moreover, by an integrative approach of the policies and actions, by encouraging research-development and innovation aimed specifically at this population segment, new jobs can be created, new occupations and business opportunities can emerge.

One of the useful tools developed at European level with this purpose is the Active Ageing Index (AAI) which measures performances and possibilities of tapping into the resources of this field based on the following criteria:

- Employment Of Elderly (Employment Rate On Age Groups (55-59, 60-64, 65-69, 70-74);
- Social Activity And Participation Of Elderly (Voluntary Work, Caring For Grandchildren, Caring For Much Older Persons, Participation To Politics);
- Independence And Autonomy Of Elderly (Physical Exercises, Access To (Public) Services, Financial Security, Physical Security);
- Capacitating And Facilitating Environment For Active Ageing (Life Expectancy remaining at the age of 55 years, the percent of

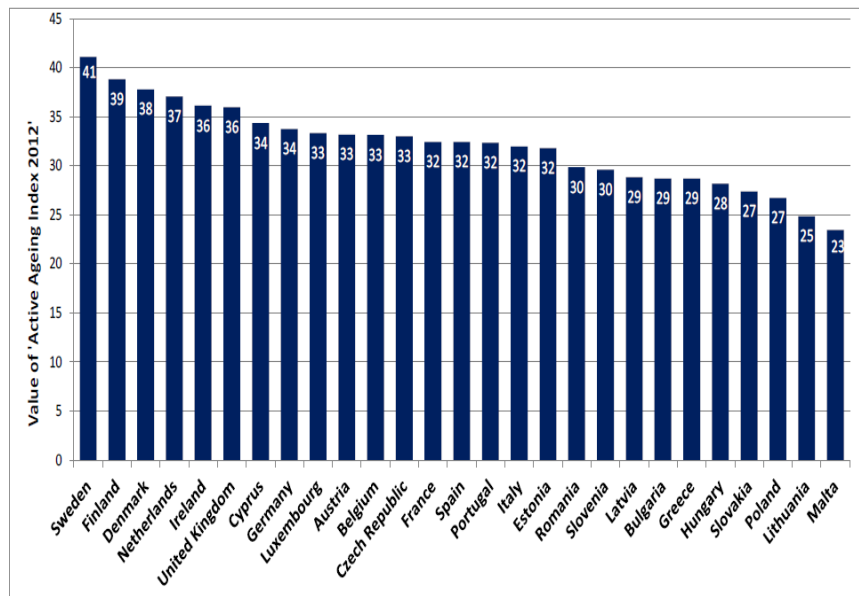


healthy life expectation at 55 years of age, mental health, use of ITC, social linking).

These indicators capture the two established components of active ageing, respectively the experiences of the active ageing process and the capacities and resources of the individuals for active ageing.

A first finding, shows that the majority of the countries in Central and Eastern Europe are placed in the second half of the ranking with respect to the way in which the policies approach the unused potential of active ageing capabilities, the discrepancy and risks for these countries being the more high as even developed countries use these resources much under the actual possibilities, as shown in the graph hereunder.

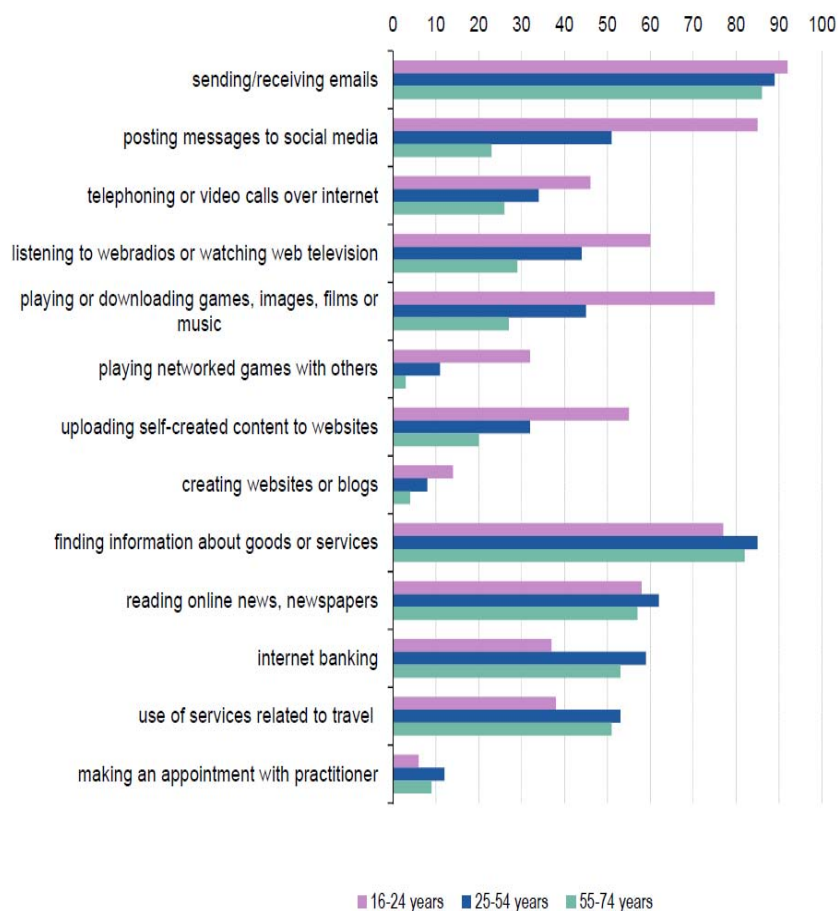
**Figure 1:** Untapped Potential of Active Ageing in EU-27, in 2012



Source: [www.careerandage.eu/.../Active%20Ageing%20Index%202012.pdf](http://www.careerandage.eu/.../Active%20Ageing%20Index%202012.pdf)

This fact is even more significant if correlated to the types of ITC use at EU-27 level in the year 2012 from the social perspective and on age groups.

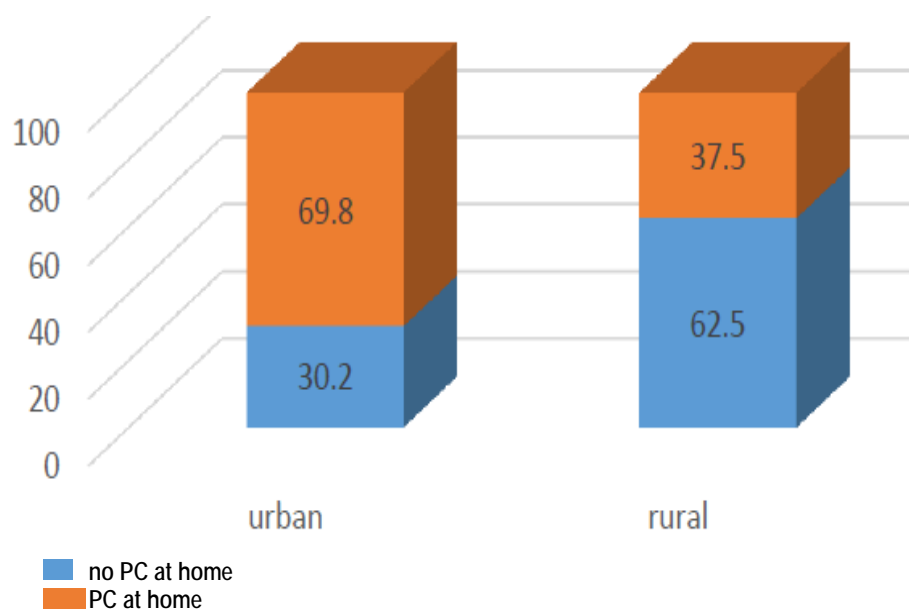
**Figure 2:** Use of internet for communication, entertainment and other selected activities on age groups within EU-27, in 2012 (% of internet users)



Source: Eurostat (online data codes: [isoc\\_bde15cua](#), [isoc\\_ci\\_ac\\_i](#))

For Romania, one of the highest risks related to tapping into this potential is given by the wide difference between the urban and rural area with respect to access to computers and the use of communication opportunities (for paid activities, for communication as such, but also for ensuring access to public and social services, and to health-care services as well) in households, at large.

**Figure 3:** Structure of households according to the endowment with a home computer on areas of residence in 2013



Source: NIS – Population access to information and communication technology in 2013

If we consider the issue of households from Romania that have computers from the viewpoint of the head of the household, we find that next to unemployed, and self-employed, the elderly are in the lower part of the ranking, which indicates a major need of improving policies aimed to encourage the participation of this segment to active and productive life, but also to the social life.

The initiative and option to make use of the benefits of internet (networking) depend to a large extent on the professional/occupational status (in a direct relationship with the level of education), on the last job, and on the relevance that the use of information and communication means has for the held job. This must also take into account the differentiation given by the development level of the region in which the respective individuals develop their activity, and in Romania these differences are significant between the development regions.

**Table 1** *Share of households endowed with PC according to the occupational status of the head of the family in 2012 and 2013*

% in total household for each occupational status		
Occupational status of the family head	2012	2013
Employee	80.6	83.8
Employer	90.5	96.5
Self-employed	31.0	38.2
unemployed	54.7	60.2
Pensioner	31.4	34.7
Pupil, student	94.7	94.5

Source: NIS – Population access to information and communication technology 2013

Leaving aside the occupational status, interesting information is given by the fact that the number of elderly women who use PCs is higher than the one of elderly men, which ascertains a trend noticed also in young age groups, respectively the higher openness and flexibility of women as compared with men.

**Table 2:** *Structure of households endowed with PC according to the age group of the family head in 2013*

PC	% in total households with			
	Age group of the family head	Total households with PC	Gender of the family head	
			Male	Female
	Total	100.0	100.0	100.0
	16 to 24 years of age	2.1	1.5	4.6
	25 to 34 years of age	12.5	12.5	12.3
	35 to 44 years of age	26.0	29.2	13.9
	45 to 54 years of age	22.9	24.7	16.0
	55 to 64 years of age	22.5	22.1	24.1
	65 to 74 years of age	4.4	7.4	16.8
	74 years of age and over	4.6	2.6	12.8

Source: NIS – Population access to information and communication technology 2013

If we look also at the education level of the family head, the result is that families where the family head has higher education or upper secondary education, are more probable to have PCs than the ones where the family head has only lower secondary or just simple primary education.

If we put this (summary) information into perspective, according to the mentioned indicators regarding active ageing (AAI), we obtain for Romania a rather worrying image about the present and future of active ageing, even though in some fields Romania has performances comparable to the ones of the other Member-States. The image on countries shows that on several policy fields and domains, the different approaches of active ageing at national level leaves its mark on the overall performance of the respective countries in the field.

**Table 3** Ranking of EU-27 Member-States according to the overall active ageing index and on specific fields indicators (total males and women)

OVERALL	1. Employment	2. Social activity and participation	3. Independent/ autonomous living	Capacity/enabling environment
1 Sweden	1 Sweden	1 Finland	1 Denmark	1 Sweden
2 Finland	2 Cyprus	2 Italy	2 Sweden	2 Denmark
3 Denmark	3 UK	3 Belgium	3 Netherlands	3 Netherlands
4 Netherlands	4 Portugal	4 Netherlands	4 Finland	4 Luxembourg
5 Ireland	5 Estonia	5 Luxembourg	5 Germany	5 UK
6 UK	6 Denmark	6 Spain	6 UK	6 Ireland
7 Cyprus	7 Finland	7 France	7 Ireland	7 Finland
8 Germany	8 Netherlands	8 Ireland	8 Luxembourg	8 Belgium
9 Luxembourg	9 Romania	9 Sweden	9 France	9 France
10 Austria	10 Germany	10 Austria	10 Slovenia	10 Austria
11 Belgium	11 Ireland	11 Czech Rep	11 Czech Rep	11 Germany
12 Czech Rep	12 Latvia	12 Hungary	12 Belgium	12 Spain
13 France	13 Lithuania	13 Cyprus	13 Austria	13 Malta
14 Spain	14 Czech Rep	14 Denmark	14 Hungary	14 Czech Rep
15 Portugal	15 Austria	15 Slovenia	15 Lithuania	15 Italy
16 Italy	16 Bulgaria	16 Germany	16 Romania	16 Bulgaria
17 Estonia	17 Greece	17 Greece	17 Malta	17 Cyprus
18 Romania	18 Spain	18 UK	18 Estonia	18 Portugal
19 Slovenia	19 Slovenia	19 Slovakia	19 Italy	19 Slovenia
20 Latvia	20 France	20 Romania	20 Cyprus	20 Lithuania
21 Bulgaria	21 Italy	21 Portugal	21 Poland	21 Estonia
22 Greece	22 Luxembourg	22 Estonia	22 Spain	22 Poland
23 Hungary	23 Slovakia	23 Poland	23 Slovakia	23 Greece
24 Slovakia	24 Poland	24 Latvia	24 Portugal	24 Slovakia
25 Poland	25 Belgium	25 Bulgaria	25 Greece	25 Hungary
26 Lithuania	26 Hungary	.. Lithuania <sup>§</sup>	26 Bulgaria	26 Latvia
27 Malta	27 Malta	.. Malta <sup>§</sup>	27 Latvia	27 Romania

Source: Active Ageing Index 2012

### 3. Conclusions

The current stage of development at European level, demands new and innovative approaches regarding active ageing from the viewpoint of policies, actions, initiatives and measures dedicated to this increasingly more significant population segment.

In the wake of the financial and economic crisis, and with the still persisting uncertainties of the economic climate, one of the most vulnerable, yet not fully harnessed potential is the one of elderly who are still willing to get involved in an active lifestyle, and able to contribute to the economic and social welfare of the society they live in.

In Romania, while performances look somewhat promising in the field of their employment for extended periods of time, serious consideration must be further given to the quality of the environment that enables healthy and active ageing.

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