

**Artículos / Articles****Ageing in southern Europe. Emerging perspectives and challenges for sociology / Envejecimiento en el sur de Europa. Perspectivas emergentes y desafíos para la sociología****Francesco Marcaletti**Departamento de Psicología y Sociología, Universidad de Zaragoza, España / Spain  
fmarcaletti@unizar.es**Tatiana Iñiguez-Berrozpe**Departamento de Psicología y Sociología, Universidad de Zaragoza, España / Spain  
tatianai@unizar.es**Emma Garavaglia**Dipartimento di Sociologia, Università Cattolica del Sacro Cuore, Italia / Italy  
Emma.Garavaglia@unicatt.it**Recibido / Received:** 26/04/2018**Aceptado / Accepted:** 16/08/2019**ABSTRACT**

The process of transitioning to an ageing population has occurred later, but nevertheless more intensely, in Southern Europe than in other regions. Consequently, these countries have been forced to politically, socially and economically adapt to this significant challenge. Sociologists play an important role in identifying and understanding social trends and issues, as well as in contributing to the design of public policies across Europe. However, research has tended to explore issues of ageing populations in Northern Europe, in spite of the notable demographic shifts and contextual specificities of Southern Europe. In response, this study has a dual objective: first, to collect the theoretical and methodological contributions of authors from or focusing on Southern Europe, and second to explore the originality of studies that belong to Southern European sociological traditions. In order to systematise the study, the theoretical paradigm of Marshall's classification of social science theories in the field of ageing is used. Specifically, the present study incorporates the topics of active ageing, adult education and ageing at work as the main foci of analysis. The results of this theoretical study

**RESUMEN**

*El proceso de transición hacia una población que envejece ha ocurrido de manera más tardía, pero de forma más intensa, en el sur de Europa que en otras regiones. En consecuencia, estos países se han visto obligados a adaptarse política, social y económicamente a este importante desafío. Los sociólogos juegan un papel importante en la identificación y comprensión de las tendencias y problemas sociales, así como en la contribución al diseño de políticas públicas en toda Europa. Sin embargo, la investigación ha tendido a explorar los problemas del envejecimiento de la población en el norte de Europa, a pesar de los notables cambios demográficos y las especificidades contextuales del sur de Europa. En respuesta, este estudio tiene un doble objetivo: primero, recoger las contribuciones teóricas y metodológicas de los autores del sur de Europa, o que se han centrado en esta región, y segundo, explorar la originalidad de los estudios que pertenecen a las tradiciones sociológicas del sur de Europa. Para sistematizar el estudio, se utiliza el paradigma teórico de la clasificación de Marshall de las teorías de las ciencias sociales en el campo del envejecimiento. Específicamente, el presente estudio incorpora los temas del envejecimiento*

\*Autor para correspondencia / Corresponding author: **Tatiana Iñiguez-Berrozpe**. [tatianai@unizar.es](mailto:tatianai@unizar.es).**Sugerencia de cita / Suggested citation:** Marcaletti, F., Iñiguez-Berrozpe, T., Caravaglia, E. (2020). Ageing in Southern Europe. Emerging Perspectives and Challenges for Sociology. *Revista Española de Sociología*, 29 (1), 117-135.(Doi: <http://dx.doi.org/10.22325/fes/res.2020.08>)

show that the sociology of Southern Europe can contribute significantly both to the issue of ageing and to public policies for its management, in the process providing a more holistic and human-centred approach.

**Keywords:** southern Europe; sociological theory; active ageing; adult education; older workers.

## INTRODUCTION

Europe can be described as an “ageing society”. Demographic change, a process that has been highly impactful in recent years, is applying significant pressure to all developed countries. At the European Union (EU) level, the population share of residents aged 45–65 has increased by 7 % in the last ten years (Eurostat data on Population structure and ageing, 2016a). According to the same source, this trend will increase during the coming decades, with people aged 65 and over expected to comprise approximately 30 % of the EU population by 2050.

In Southern Europe, the proportion of older people within the total population is growing much faster than the equivalent in Northern Europe. According to Tommasini and Lamura (2009), owing to their traditional high fertility rates and higher life expectancy, the ageing process started much earlier in Northern European countries and has been more persistent than in Southern Europe. Nevertheless, the more recent demographic tendency towards ageing has been so fast and profound in Southern Europe that this region can today be considered, together with Japan, as one of the “oldest” areas of the world. Southern European countries have been forced to quickly adjust to a new context in which the ageing process is having real and significant impacts on social, cultural and economic spheres alike. Policymakers have thus been prompted to intervene in order to address the related challenges.

According to Eurostat (2016a), Southern European countries are among the “oldest” in Europe.

*activo, la educación de adultos y el envejecimiento en el trabajo como los principales focos de análisis. Los resultados de este estudio teórico muestran que la sociología del sur de Europa puede contribuir significativamente tanto a la cuestión del envejecimiento como a las políticas públicas para su gestión, en el proceso de proporcionar un enfoque más holístico y humanista.*

**Palabras clave:** sur de Europa; teoría sociológica; envejecimiento activo; educación de adultos; trabajadores mayores.

In terms of mean population age, Italy (45.5 years), Portugal (44.0), Greece (43.9) and Spain's figures (42.8) are higher than the EU28 figure (42.6), with only Malta (41.1) and Cyprus (37.2) below that threshold.

In this new and challenging scenario for Southern Europe, sociology is increasingly regarded as playing an important role in contributing to the observation and understanding of such an unprecedented transition, as well as assisting in the design of effective policies. This paper addresses issues related to population ageing in contemporary Southern European societies, in light of the major theoretical contributions brought by the sociology of ageing in recent decades. Indeed, increased longevity as well as the growing share of the elderly population due to the fall of fertility rates has instigated unprecedented challenges to individual lives and society, exposing sociological thinking to new and still unresolved questions.

The study of ageing, which dates from the end of the 19<sup>th</sup> century (Ferraro, 2006), has traditionally been characterised by a multidisciplinary approach (Marshall and Bengtson, 2011). Nevertheless, a prominent role has historically been played by classic gerontology (Estes, Biggs and Phillipson, 2003), the science that studies the biological implications of the ageing process. Moreover, in spite of growing attention to the ageing topic by classic sociologists in the middle of the 20<sup>th</sup> century (*e. g.* Parsons, 1942), the paramount role of classic gerontology rendered it difficult for social theory to make original contributions, both theoretically and methodologically. It is also important to acknowl-

edge that classic gerontology, alongside social gerontology and its “critical” variation (Phillipson, 1982), grew especially within Anglo-Saxon scientific and academic environments. Thus, theoretical assumptions and empirical practices are still strongly influenced by traditions that are in many ways distant from a Southern European sensibility.

The development of sociological studies on ageing has also been subjected to stereotyping and isomorphic pressures, since the management of growing shares of the elderly population has increasingly been viewed as a target topic by national policies and supranational strategies (*e. g.* the World Health Organization and the EU), and relatedly the object of recommendations (*e. g.* United Nations Economic Commission for Europe, International Labour Office, Organisation for Economic Co-operation and Development). Furthermore, the study of ageing within the social sciences has also varied according to the different traditions and paradigms that have arisen in diverse European areas, as well as in different historical contexts. Scholars from Anglo-Saxon and Northern European countries initiated study of the topic before their Southern European counterparts owing to cultural reasons (*e. g.* the influence of mainstream structuralism in the USA since the 1950s) and because they were earlier in addressing the ageing topic with *ad hoc* policies (as has been the case of most Northern European countries since the early-1980s). This fact has undoubtedly influenced these regions’ research agendas. The way in which population ageing is interpreted and managed by public strategies also varies considerably across different European areas and countries, with Southern countries again responding only subsequently to their Northern counterparts.

Stemming from these general observations, the objective of this paper is to review the theoretical approaches and paradigms adopted within sociological research on ageing in Southern Europe, and to discuss their specific contributions to this scientific field.

Sociological theories on ageing have been classified along the axis of the normative/individualistic continuum on the side of theoretical development, and along the axis of the micro/macro approaches on the methodological side (Marshall,

1996). As will be explained in the following sections, Marshall’s classification—and its developments—will be assumed as a reference milestone within this paper, since this represents the most systematic contribution to the theoretical development of sociology of ageing.

Together with a review of the literature and the original contributions presented by Southern European scholars, the main questions that this paper address are as follows:

— Are there elements emerging from research carried out in Southern Europe that represent a step forward, under theoretical and empirical perspectives, according to the scientific literature that has been consolidated in recent years?

— How can these research and theoretical acquisitions be framed within the current “state of the theory” (Marshall, 1996: 12) of the sociological reflection on ageing?

— How can the exploration of issues related to population ageing and specific to Southern European countries help improve broader sociological understandings of the topic?

As such, this paper has two main objectives: to contribute to the theoretical and methodological conceptualisation of sociology as regards different aspects of the ageing process, and to explore (as feasible) the originality of studies conducted by scholars belonging to Southern Europe sociological traditions. Indeed, given the contrasting social, political, economic and cultural contexts present here, the ageing process in Southern Europe has its own specificities (and internal diversity) that deserve to be foregrounded, and which can also represent a framework within which new sociological theoretical and methodological perspectives of ageing may arise.

## THEORETICAL BACKGROUND

The systematisation of sociological theories concerning ageing has been central to Victor W. Marshall’s scientific study. During the mid-1990s, the author published a contribution within the *Handbook of Aging and the Social Sciences*

(Binstock and George, 1996) entitled “The State of Theory in Aging and the Social Sciences” (Marshall, 1996). Marshall attempted to classify the most important theories on ageing in sociology and related disciplines, and proposed this classification as an ideal-type. The classification is organised along two axes, which represent the long-standing tensions that have characterised the sociological tradition: on the one hand the micro-macro dimension, and on the other the distinction between normative and interpretative theorising (1990).

The micro-macro dimension reflects the methodological debate between predominant positivist deductive approaches based on large-scale studies, and (increasingly popular) alternative inductive approaches that do not rely on positivist postulates and that are based on small-scale studies. The meso-dimension represents an intermediate linking position.

The normative-interpretative axis reproduces the theoretical debate crossing the entire sociological tradition concerning the interpretative assumptions that explain the relationship between individuals and society. The normative pole affirms that social norms are imposed upon individuals, whilst the interpretative pole affirms that individuals produce their own norms and understandings of society. Bridging approaches attempt to reconcile the two perspectives.

In this way, Marshall classifies the most relevant theories on ageing in the field of sociology and its neighbouring social science disciplines, starting from the normative-macro and ending with the interpretative-micro.

Instead of discussing the contents of the classification, we proceed by considering Marshall's return, 15 years later, to the theories he had reviewed in his classification. In a contribution written together with Vern L. Bengtson for the *Handbook of Sociology of Aging* (Settersen and Anegl, 2011), he updated his perspective according to the discipline's advancement, and suggested some future directions for theories of ageing (Marshall and Bengtson, 2011). In this contribution, the authors also distinguish sociological theories according to the historical phase of their development, enabling them to identify three fundamental phases:

- Early developments in the sociology of ageing.
- Developments from the 1980s.
- Current theoretical development.

In “Early developments in the sociology of ageing”, Marshall and Bengtson consider the contributions of authors like Burgess (1960) and his theory concerning the shift of the aged toward a “role-less role”, and Cumming and Henry's (1961)

**Table 1.** Marshall's classification of social science theories in the field of ageing.

Level of analysis	Normative	Bridging	Interpretative
MACRO	Structuralism Modernisation and ageing theory	Interest group theory Institutional theory	Political economy
LINKING	Disengagement and activity theory “Birth and fortune” thesis Age stratification perspective	Life course perspective Feminist theories	Critical theory Symbolic interactionism and phenomenology Cultural anthropology
MICRO	Role theory Developmental theory Conventional economics and rational choice theory	Exchange theory	Self and identity theories (community theory; career/status passage; dramaturgical)

Source: Marshall, 1995: 13.

“disengagement” theory. These theories, influenced by structuralism and postulating the progressive (and “planned”) loss of functional and social roles by the elderly, can be contrasted with the “activity” theory (Havighurst and Albrecht, 1953) and its derivative “successful aging” theory (Havighurst, 1961; Rowe and Kahn, 1998), which postulate (still within the normative perspective) the adjustment process that the elderly can undertake in order to keep active. This section also considers theories concerning age norms and their influence on shaping normative roles for the elderly (Neugarten, 1974), as well as theories related to “ageing and modernisation”. The latter is interpreted as a deterministic structure operating at the level of social institutions. Other theories have also been set at the micro or social psychological level.

Under “Developments from the 1980s”, Marshall and Bengtson (2011: 19) consider three perspectives that brought “significant changes to the definition of the field” in the decades to come. The first is the establishment of the political economy perspective, which outlines the socio-political production of the aged as a problem, and hence stands in contrast with the age and modernisation theory of authors like Cowgill and Holmes (1972). This macro and interpretative perspective had been advanced by several scholars during the 1980s and 1990a, including Estes (1979), Townsend (1981), Walker (1981), Guillemard (1983) and Kholi *et al.* (1991). The second significant perspective is the development and formalisation of the life course theory, initially proposed by Cain (1964) and later refined by authors like Elder (1974, 1995) and Abeles and Riley (1977). Originating in the Chicago School’s approaches, especially its attention to the longitudinal analysis of individual lives, the life course perspective has been classified by Marshall as an example of meso (linking) level theorising, attempting to bridge normative and interpretative paradigms. The third perspective arising as a development since the 1980s is the interpretative sociology and the social construction of ageing and the life course. This perspective bridges traditions such as symbolic interactionism, phenomenology and other interpretative approaches in order to emphasise individual agency during the life course. In this case, the contributions can be classified un-

der the meso and interpretative cell of Marshall’s classification. In the phenomenological tradition, authors including Handel (2000), Newman (2003) and Holstein and Gubrium (2007) have indicated that the life course is a social institution produced as a social constructed reality.

Under “Current theoretical developments in the sociology of ageing” Marshall and Bengtson recap the emerging perspectives that arise either as a development of pre-existing sociological theories on ageing or as an interpretation of the ageing process in light of other sociological theories. The emerging perspectives are listed as follows (2011: 21-27):

- Stress theory, ageing, and the life course.
- Cumulative inequality.
- The standardised life course.
- Risk society.
- Chance events and the life course.
- Structure and agency in the life course.
- The family and the life course.
- Critical gerontology and the critical feminist perspective.
- Globalisation, ageing, and the life course.

Finally, in their joint contribution the authors introduce issues that should be addressed in order to facilitate the continued advancement of the sociology of ageing. First, and as had been emphasised in Marshall’s production in the 1990s, they propose the importance of further explanatory sociological theory about ageing, which go beyond confirmative and theory-supportive approaches. Indeed, according to the authors, in the field of ageing studies “the collection of information —data— about these important issues will not add much to our deeper knowledge unless we pay attention to the development of theory about social processes and the course of life to help us understand the data we accumulate” (2011: 29). Second, Marshall and Bengtson call for greater awareness of previous theorising in order to understand what has been already theorised and to reject approaches that are no longer relevant. Third, the authors argue for more interdisciplinary theories, since “disciplinary boundaries have increasingly become barriers to aging and life course theorizing” (2011: 28). They also recommend greater attention to the fact that

the current predominance of the life course paradigm should not overshadow other useful perspectives arising from sociology, such as theorising on social institutions. Fifth, the authors underline the importance of being aware of diversity in the study of social aspects of ageing. Finally, they place attention on the fact that the sociological study of ageing, in spite of the general absence of explanatory theories, has demonstrated significant improvements in a relatively short space of time.

In conclusion, with respect to the “state of the theory” on ageing depicted by Marshall (1996: 12) and Marshall and Bengtson (2011), and the absence of a specific, previous approach to Southern European sociological theories on ageing, it is possible to argue that both the ideal-typical classification according to the sociological perspectives, and the classification of theories according to historical phases, represent helpful tools for orienting and exploring the original contributions of sociology of ageing in Southern Europe. Nevertheless, the classification will not be used as a rigid method, but rather as a reference milestone for discussing the contributions presented in this paper.

## ACTIVE AGEING IN SOUTHERN EUROPE

The following sections examine three active ageing-related topics, significant within Southern European sociology. The literature review does not aim to be exhaustive, but nonetheless address topics stemming from a comprehensive interpretation of active ageing that emphasises not only the importance of health and well-being for social inclusion in old age, but also the active inclusion of older people in various social spheres such as education and the labour market.

In order to explore the development of literature concerning these topics, we primarily consider the contributions of authors who published in the English language in international scientific journals. Contributions published in Spanish and Italian scientific journals have been included as well, due to the authors' knowledge of these languages. The prevalence of confirmative studies or simple data collections that Marshall and Bengtson (2011)

treat as a concern in their work also affects the sociology of ageing in Southern Europe.

## AGEING ACTIVELY

Active ageing (AA) finds its first formulation at the end of the 1990s as a more comprehensive strategy for achieving healthy ageing (Kalachea and Kickbusch, 1997). In 2002, in a contribution for the Second United Nations World Assembly on Ageing held in Madrid, the WHO proposed the well-known definition of active ageing that has persisted until the present day. In a document addressed to the Assembly, the WHO (2002a: 12) specified that “Active ageing is the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age”. In spite of its brevity, the definition is thorough, addressing multiple issues raised by the ageing process. In particular, the WHO (2002a: 12) clarifies the use of some terminology within the definition. For example, the document specifies that “the word ‘active’ refers to continuing participation in social, economic, cultural, spiritual and civic affairs, not just the ability to be physically active or to participate in the labour force”; moreover, that “‘Health’ refers to physical, mental and social well-being as expressed in the WHO definition of health”.

Thus, the definition addresses three macro topics, encompasses one general strategy, and sets a general goal. The three macro topics are those already specified, starting from the health issue. According to WHO, an AA strategy should implicate the broadening of access to care services at a reasonable cost, thus guaranteeing its inclusivity of the whole population. Furthermore, as already specified, the field of participation covers different fundamental life spheres, hence extending the AA strategy towards scopes such as work, education and community life. In turn, these life spheres extend the application of AA to other spheres that can be adopted as tools to achieve AA goals, such as ICT literacy, nutrition, financial education, and so forth. Finally, the third topic covered is security, which primarily refers to the fundamental vital dimensions of autonomy and independent living. In these fields, not only are disabilities and frail-

ties of functional capacities as defined by WHO's (2002b) ICF<sup>1</sup> considered, but also other dimensions that may be evaluated as strategic for healthy and active ageing, including housing and economic conditions.

Concerning AA as a strategy, WHO's definition clearly specifies that the process refers to the optimisation of opportunities, "as people age". The nature of this strategy raises multiple issues related to equality, in the process opening the discussion to the topic of diversity (Villar Posada *et al.*, 2018). As will be shown, people do not age at the same pace, nor does the population ageing process work in the same way in every country (and not even in geographic areas that might be considered homogeneous owing to culture, lifestyle, and welfare assets, like Southern Europe).

What remains unchanged from country to country is AA strategies' general aim to enhance older people's quality of life. Moreover, this general aim applies at every age and is additionally expressed with the goal of extending the so called "disability-free life expectancy". Thus, increasing the number of years of healthy life, and reducing the number of years spent suffering chronic disabilities both represent major concerns for every political decision-maker, owing to several associated implications. For instance, how long should be the working life-span? Is it possible to include and extend the working life of individuals who suffer from disabilities? When should workers retire? How should the increasing costs of pensions and the loss of autonomy of an increasing number of elderly people for an increased number of years be managed?

A quick look to healthy life expectancy data clearly illustrate, more than other examples, the importance of the strategic goal of extending disability-free years. If we consider six countries in Southern Europe —Greece, Malta, Cyprus, Italy, Spain and Portugal— it is possible to observe that all demonstrate life expectancies at birth above the European mean, both for women and men. In 2015, the highest female life expectancy at birth was found in Spain (85.8 years), and for men in

Italy (80.3 years)<sup>2</sup>. Nonetheless, healthy life years at birth for women in Spain only stood at 64.1 years, or just 74.7 % of Spanish women's life-span, with the remaining 21.7 years spent with disabilities. This figure reaches almost 30 years in the case of Portugal. A similar dynamic can be observed in the case of Italian men, who only reach 62.6 years disability-free, or 77.9 % of their life span, with the remaining 17.7 years of their lives spent with disabilities. Once again, the worst figure is found in Portugal, at almost 20 years.

Thus, in spite of quite similar life expectancies at birth, the ways in which people in Southern European countries age are highly heterogeneous. Moreover, women and men age differently. A country like Portugal holds the lowest percentages of disability-free life, despite its high life expectancy at birth. On the opposite side, the figures of Malta impress owing to the highest percentages of disability-free life both amongst women (88.9 %) and men (91.2 %). Moreover, in spite of the differences in life expectancies at birth, the gender divide in terms of healthy life years almost completely disappears in every country considered. Women still maintain a slight advantage over men, except in the case of Portugal, where men have a lower life expectancy at birth than women but a longer healthy life-span.

These data demonstrate convergent (*e. g.* life expectancy at birth) as well as divergent (healthy life years) trends between Southern European countries. This topic has been recently discussed in literature. Following previous studies (Troisi and Kondratovitz, 2013), Kondratovitz (2015) analyses two concepts: the modernisation process taking place in the Mediterranean basin, and the idea that the whole region is unified (and crystallised) with regard to the ageing process. The author aims to define a strategy for international comparative research in gerontology in Mediterranean countries, *i. e.* in Southern Europe, North Africa and Turkey. Under the theoretical view, Kondratovitz suggests an interdisciplinary approach based on:

— The *histoire totale* (total history) theory, based on the studies of the French Annales School (Revel and Hunt, 1995).

1 International Classification of Functioning, Disability, and Health.

2 Own processing of Eurostat hlth\_hlye data.

- Theories of social and cultural anthropology.
- The fundamentals of discourse analysis.
- Post-colonial theories.
- Reflexive modernity theories (Beck *et al.*, 1996).

Other recent contributions attempt to set an agenda for research on ageing focused on the countries of Southern Europe, actualising a theoretical and methodological tradition that nonetheless dates from almost thirty years ago. In this respect, it is possible to regard some contributions within the Italian collective book *L'anziano attivo* (*The Active Elder*) (Urbani *et al.*, 1991) and an article for the *Revista Española de Investigación Sociológica* (*Spanish Journal of Sociological Investigation*) entitled *La nueva sociología de la vejez* (Bazo, 1992) as the first systematic contributions of the Southern Europe sociological tradition. For example, Rodríguez Rodríguez *et al.* (2012) present a road map for future research on ageing, as a Spanish contribution to the European Futurage network's activities. According to the authors, as also reported by Aguilar Parra *et al.* (2013), the three main areas of investigation are: 1) healthy and active ageing to be analysed as an issue through adopting a multidisciplinary approach; 2) the socio-economic and environmental resources of the elderly, and 3) bio-gerontology. The topics related to bio-gerontology are more distant from the social sciences.

Once again, following a similar path stimulated by the 2012 European Year for Active Ageing and Solidarity between Generations, interdisciplinary attention in Italy was also placed on developing an agenda for research on active ageing and healthy living (Riva, Ajmone Marsan and Grassi, 2014). The originality of the proposal arising from the empirical experiences collected in the book is the notion of leaning on a human-centred approach that is rooted in humanistic epistemologies.

An example of the human-centred approach proposed by the book, which is based in the field of sociology and applies to ageing, is the relational theory underpinning the survey "I don't want to retire". This was conducted in Italy in 2013-14 with a representative sample of 900 elderly people aged between 65 and 74 years old, with the aim of ex-

ploring active ageing dimensions (Bramanti, Meda and Rossi 2016).

According to the authors, relational sociology

observes the individuals as included in networks of significant relationships. From this point of view, the family is seen as the basic social relation, the spring of society, capable of establishing alliances between genders and generations. Furthermore, the family —insofar as it fully expresses its social subjectivity— creates forms of sociality and promotes forms of prosocial belonging for its members (Rossi *et al.*, 2014: 58).

The same sociological paradigm underpins two recent studies concerning intergenerational solidarity —that is, another pillar of EU's AA strategy— carried out in Spain (López López, González Hincapié and Sánchez Fuentes, 2015; Cavallotti and Marcaletti, 2017).

Finally, it is worth to mention the growing amount of systematic contributions devoted to specific theoretical aspects of active ageing, authored by Southern Europe scholars (Marcaletti, 2007; Marcaletti, Garavaglia and Milone, 2014; Ezquerro, Pérez Salanova, Pla and Subirats, 2016; Scabini and Rossi, 2016).

## AGEING AND ADULT EDUCATION

Adult Education (AE) has been positioned as an important strategy of the European Commission in the promotion of active aging and older adults' social inclusion. While inequalities exist in participation in adult education across age and socio-economic groups in a wide range of countries, they tend to be smaller in Northern and Central European states in comparison to their Southern European counterparts (Eurostat, 2016b). If we take into account the latest available data from this source, differences in older adults' participation in formal and non-formal educational activities are evident. In Norway, the Netherlands, Sweden and Switzerland, participation rates in AE amongst adults aged 55-64 are above 50 %; however, in Southern Europe this rate is far lower, such as 33.0 % in Italy, 29.9 % in Cyprus, 29.0 % in Spain, 28.6 % in Portugal and below 20.0 % in Malta, Croatia and



Greece (Eurostat, 2016b). This inequality is also evident in the international literature on AE, which is rather *Northist-dominated* (Borg and Mayo, 2008). However, in spite of the general absence of Southern European countries in official statistics and international scientific contributions, we can identify interesting and innovative, emerging proposals to approaching AE in both academic and social environments, facilitating a more socially transformative vision for this topic.

According to Borg and Mayo (2008), three main reasons exist to attend to the specificity of Southern European AE scientific study. First, owing to the hegemony of the English language, the AE literature has excluded interesting contributions from countries including (but not limited to) Malta, Italy, Spain and Portugal. Second, Paulo Freire's critical pedagogy is highly relevant and influential in the study and definition of transformative practices of AE coming from Southern Europe. Finally, the demographic specificity of the southern regions of Europe, on the one hand being the principal recipients of immigrants from North Africa, and on the other hand being countries undergoing a recent but rapid and constant process of population ageing, renders AE highly relevant here according to Southern European authors.

Regarding the first element, the predominance of English in AE theories and practices has led to the exclusion of many contributors from Southern European countries (Macedo, Dendrinou and Gounari, 2003; Guimaraes, Lucio-Villegas and Mayo, 2018). Aligned with this idea, Borg and Mayo (2008) also denounce the international literature on AE for being dominated by ideas and experiences from Northern and Central Europe, and for consequently being those that tend to be incorporated in European AE policies, as a result silencing movements and local initiatives on AE that could have brought visibility to groups traditionally excluded by neoliberal and globalising dynamics, including the elderly, women and migrants. Facing this hegemonic globalisation, numerous examples exist in Southern Europe of what Boaventura de Sousa Santos describes as practices related to counter-hegemonic globalisation or globalisation from below (Dale and Robertson, 2004). Taking into account only the scope of AE, these approaches are

characterised by their opposition to trends of commodification and the excessive vocationalisation of this type of education. Thus, they criticise and oppose globalisation from above, which, as mentioned, excludes older adults, among other groups (Formosa, 2000, 2007).

This idea can be connected with the second element that, according to Borg and Mayo (2008), characterises the theory of AE in Southern Europe. Indeed, taking into account the approaches of Torres (1987, 2013), Mayo (1999), Puigvert (2004), Flecha and Elboj (2005), English and Mayo (2012) and Borg and Mayo (2006, 2008), Iñiguez Berrozpe and Marcaletti (2016a, 2016b, 2017), one of the main contributions of the sociology of AE in these countries is the considerable influence of Paulo Freire and his critical pedagogy (1970). The association between education and politics, the critical struggle against inequality and hegemonic thinking through participatory citizenship, and how this can only be achieved through education, are ideas included in the aforementioned authors' works, but, also in the specific experiences that they collect in their different countries.

In this sense, influenced by these theories, Formosa (2000, 2007), Borg and Mayo (2008) and Guimaraes, Lucio-Villegas and Mayo (2018) criticise the aforementioned "top-down" vision and current hegemonic economy-oriented discourses that remain prevalent in European AE theories. The ideas of flexibility, mobility, job-related counselling and basic employment-related skills are essential in European documents on AE policies. This economic and instrumental vision of AE is related to a macro-normative orientation, influenced by the structural functionalism regarding older adults, following Marshall's classification (1996) in which older adults are defended as having a lot to offer the economy provided that their work skills are updated, and so their pensions no longer represent a burden for national governments.

Advocating for a form of AE with a more comprehensive and humanistic orientation, and following Freire's precepts, when taking into account concepts beyond instrumentality (such as community, citizenship and solidarity), some Southern theorists have supported what has been termed "the critical turn of AE" (English and Mayo, 2012: 215; Torres,

2013). This model is based on social interactions and the effect of agency (as a collective) on the structure in order to produce social transformation, and advocating for interaction between macro and micro sociological levels. In Alexander's words, "Neither micro nor macro theory is satisfactory. Action and structure must now be intertwined" (1988: 77 quoted in Marshall, 1996: 11). Furthermore, this is more an interpretative than a normative approach, with strong relations with Jürgen Habermas' critical theory emphasising the importance of communication and negotiation (intersubjective dialogue) through which agents themselves, and agents and structure, can reach agreements (Ritzer, 1988: 490, cited in Marshall, 1996: 16). The objective here is to transform inequalities through education (Flecha and Elboj, 2005).

The influence of Freire's critical pedagogy (1970) and the importance within of Habermas' intersubjective dialogue (1987-1989) in this bottom-up social transformation through education, has also had a relevant echo in the third element that we mentioned at the beginning of this section: the demographic particularities of the Southern European countries. On the one hand, their character as recipients of immigrants stimulates critical pedagogical claims for the provision of educational materials and practices that support the resettlement of migrants (Borg and Mayo, 2006). On the other hand, the progressive process of population ageing in Southern Europe (in the absence of social protection) causes AE to be demanded by academics not only as a tool for older people's inclusion in the labour force, but also to improve their quality of life, to make their lives meaningful, and to promote their participation in a community (Borg and Mayo, 2008; Milani, 2002).

An example of bottom-up research inheriting such a Freirean approach and the particularities of Southern European countries is provided by the Community of Researchers on Excellence for All (CREA) in Barcelona, Spain, based on adult education in learning communities. Specifically, among other works, we can quote "La Verneda-Sant Martí Adult School: A Reference for Neighborhood Popular Education" by Aubert *et al.* (2016). In this paper the authors analyse the relevant contributions of La Verneda School to the transformative movement

in democratic education. In a deprived area of Barcelona, with a high percentage of (for instance) migrants, people from cultural minorities and older illiterate adults, this school has become an international paragon. The democratic organisation of the school, its basis in egalitarian and intersubjective dialogue, its openness to the community, and its probable role in improving La Verneda's neighbours' quality of life through education represent the keys to its success. Its non-academic adults' empowering and transformative aim has attracted the attention of the most important European research projects on education (*i. e.* INCLUD-ED, 2006-2011 Framework Programme, European Commission). Another relevant outcome from it and other CREA research on this topic is the use of communicative methodology, based on Habermas' theory of communicative action (1987-1989). Through communicative interviews, focus groups, observations and other qualitative techniques, it has achieved a

continuous and egalitarian dialogue among researchers and the people involved in the communities and realities being studied. To this dialogue, researchers bring existing scientific knowledge, and the researched subjects contribute knowledge from their lifeworlds. In this process, new understandings emerge informing solutions to many social problems. Later, social actors lobby for the development of effective social policy based on those solutions (Gómez, Puigvert and Flecha, 2011: 235).

Thus, the communicative approach has not only been considered an important contributor in many international publications with a significant impact, but also facilitates subsequent transformative policy decisions on social issues.

Therefore, the sociology of education in Southern Europe calls for a transformative and emancipatory AE approach that follows the Freirean trend. According to academics such as Flecha (1997) or Flecha and Elboj (2008), the objectives of AE in an ageing Europe are to overcome ethnocentrism through developing educational processes based on the contribution of different cultures to recognising the equality of differences. Moreover, it must take into account the voices and experiences of these adults in the construction of their own learn-

ing though intersubjective dialogue, and give new prominence to the community, to cultural areas, to education for active citizenship and to the creative use of free time. Ultimately, as specified by Milani (2002), overcoming the neoliberal discourse that prevails in the hegemonic globalising discourse and that promotes market-driven values, and requires life-centred values that contribute to the community and social transformation. Certainly, and following Milani and Holford (2012), in spite of the fact that AE policies are yet to fully incorporate these ideas, educational practices in the different European regions increasingly reflect the AE critical turn.

## AGEING AND WORK IN SOUTHERN EUROPEAN COUNTRIES

The participation of older workers in the labour market is critical to coping with the effects of demographic ageing (Lynch, 2006). Across Europe, labour shortages and the unsustainable costs of social security systems (deriving from the progressive augmentation of the workforce's mean age and of the proportion of older workers within the workforce and retirees within the total population) present the main causes of concern.

Most European countries have introduced institutional reforms to tackle the challenges posed by population ageing. These have primarily consisted of reforms to the pension system with the objective of raising the state pension age, and the introduction of activation policies aimed at reducing incentives to early retirement and thus promoting older workers' continued employment.

Although this wave of reforms has been of interest in most European countries, we can still find high cross-national variation in their effects, and especially in the labour market participation of older workers (Bennett and Moehring, 2015). Specifically, we find the lowest activity rates of people aged over 50 in Southern European countries, especially Italy, Greece and Malta, whose activity rates are respectively 32.2, 28.9 and 30.0 % (Eurostat, 2016a). Moreover, significant gender gaps exist in these countries in older workers' labour market participation. Women's activity rates are much lower

than men's: in Italy, the activity rate of women aged over 50 is 24.1 %, compared with 41.8 % of men. In Greece this is 21.1 % compared with 36.8 % of men, and in Malta 17.6 % compared with 43.3 % of men (Eurostat, 2016a). A further relevant issue exists when discussing employment in old age: in Southern Europe, as in other European countries (for instance Germany), long-term unemployment is widespread amongst the elderly and often late-career unemployment represents a pathway to retirement. Finding a new job after an unemployed spell is much more difficult for older than for prime age workers (Blossfeld *et al.*, 2011; Chan and Stevens, 2001; Frosch, 2006).

Given this scenario, promoting older workers' labour market participation in Southern Europe represents a highly relevant policy objective that has driven aforementioned processes of the reform of the pension systems (Natali and Stamati, 2014, 2015). These reforms have not been accompanied by broader strategies aimed at promoting a cultural shift from the young-in old-out culture of the past. Indeed, this is a culture that retains the idea that early-retirement is a socially acceptable option in order to increase opportunities for younger workers (Guillemard, 2003). Moreover, in these countries, a lack of job opportunities continues to represent a considerable problem cutting across generations, and it increases the risk that policies designed to extend people's working lives reduce the opportunities of younger generations, thus sustaining the broadly diffused idea of an intergenerational conflict in the labour market (Marcaletti, 2013).

The study of older workers' labour market participation in Southern Europe appears to be a relevant and controversial topic. However, literature in this field and with specific attention to this area of Europe is rather scarce, aside from studies of the pension evolution that these countries have in common (Natali and Stamati, 2014, 2015). We predominantly find cross-national comparisons among European countries that highlight, among others, the specificities of Southern European countries in a comparative perspective. On the other hand, as far as country-specific studies are concerned, we will focus on the Italian case that two of the authors of the current paper have studied extensively.

As far as the comparative studies are concerned, two theoretical approaches have prevailed: the life course approach (Mortimer and Shanahan, 2003) and the approach of the political economy of old age (Estes, 1979; Estes *et al.*, 1984). These two theoretical perspectives facilitate exploration of older workers' employment conditions by taking into account how past experiences affect the final part of the career and how specific institutional conditions support or obstruct this group of workers (Bennett and Moehring, 2015; Ebbinghaus, 2006; Engelhardt, 2012). Thus, we can recognise prevailing attention to the interrelations between the micro and macro levels, that is, the individual characteristics and behaviours and the contextual (social, cultural, policy) conditions that affect the degree of inclusion of older workers in the labour market and their career paths. These different approaches have specifically informed studies about (among other topics) career trajectories and transition to retirement (Guillemard and Rein, 1993; Herberstson, 2003; Maltby *et al.*, 2004; Blossfeld *et al.*, 2006; Hofäcker, 2010; Guillemard, 2013), job quality (Dragano *et al.*, 2011; Siegrist *et al.*, 2007), and life course and employment regimes (Leisering, 2003; Hofäcker, 2010).

The results of these comparative studies have shown that Southern European countries share commonalities both from the micro and macro perspective, which derive from social and cultural norms prevalent in the Mediterranean region of Europe (Algan *et al.*, 2005), as well as from the specificities of the Mediterranean welfare system (Ferrera, 1996). Specifically, analyses defined by Hofäcker as “institutional filters” (2010: 133)—that is, the institutional conditions that affect the employment situation of the older workers: pension systems, education systems, employment relations and active labour market policies—have shown that Southern European countries can be classified as an “employment exit regime” (Hofäcker, 2010: 133). This definition refers to institutional conditions—specifically high incentives for early-retirement and competitive labour market disadvantages for older workers—that tend to incentivise early withdrawal from the labour market, instead of prolonging work careers, and obstruct labour market mobility in the late-career phase.

Among the institutional filters, we can also include the low levels of support for work following retirement that derives from the characteristics of the pension systems (Dingemans *et al.*, 2017).

Moreover, comparative analyses have demonstrated that older workers in Southern European countries, compared to Central and Northern countries, tend to report lower levels of self-perceived job quality and higher levels of work stress (Dragano *et al.*, 2011), which in turn influence the relatively early shift to retirement (especially amongst women) (Dal Bianco *et al.*, 2015) and a greater propensity to exhibit depressive symptoms (Dragano *et al.*, 2011).

A further topic that has been discussed in comparative studies about work and ageing in Europe and that highlights the specificities of Southern European countries is the management of older workers within work organisations and the role of employers in promoting older workers' employment (Conen *et al.*, 2011). Employers' contributions to active ageing policy objectives have been shown to be highly relevant (Loretto and White, 2006). The approach of the new-institutionalism and (again) of the political economy of old age, adopted in studies with a focus on work organisations (Garavaglia, 2014), have facilitated attention to the interactions between the macro level of the institutional context in which companies operate and the meso level of the companies themselves. Studies focusing on work organisations have shown that especially in Greece, Spain and Italy is exhibited a lack of corporate attention to extending people's working lives with it a general absence of specific measures regarding older workers. Employers tend not to see the ageing of the workforce as a topic of concern and do not develop management policies that can be formally defined as age management; moreover, they do not take substantial measures to retain and recruit older workers (Van Dalen *et al.*, 2009). Thus, they tend not to act proactively in response to policy initiatives aimed at prolonging the working career. The issue of older workers' recruitment is highly relevant because it is linked to late-career labour market mobility—which is lower in the countries of Southern Europe—and to age discrimination in the labour market. Through an interpretative approach, studies have demonstrated that prevailing age

norms affect managers' attitudes and behaviours towards older workers. Negative stereotypes about older workers are widespread — *i. e.* older workers are less flexible, more resistant to change and less productive (Chiu *et al.*, 2001; Finkelstein *et al.*, 1995; Loretto and White, 2000)— and they affect recruitment processes and the actual job opportunities available to workers in their late careers.

Finally, as far as country-specific studies are concerned, we have mentioned that we are focusing here on studies regarding population ageing and labour market dynamics in Italy and age management in Italian companies. In this regard, the Italian Institute for the Development of Vocational Training of Workers (ISFOL) has recently analysed older workers' labour market participation in different areas of the country and the policy challenges that have derived from workforce ageing in Italy (Fefe, 2016). The study highlights high cross-regional variations in labour market participation amongst older workers, in the job and training opportunities available to older workers, as well as in the age management practices developed within companies. It maintains that active labour market policies must be created that address workers in their late careers that, in order to be effective, take into account the highly differentiated contexts of constraints and opportunities available to workers.

ISFOL has also mapped and analysed age management practices in both SME and big Italian companies (Aversa *et al.*, 2015; Checcucci *et al.*, 2017). The studies highlight the presence of few formalised best practices in the field of age management and, in contrast, a few innovative experiences in the field of career management and human resource development that, even if not formally recognised as age management practices, implicate aspects that are highly relevant to guaranteeing the sustainability of prolonged working careers. Among the age management tools used by Italian employers, we find the Quality of Ageing at Work Questionnaire (Marcaletti and Garavaglia, 2014, 2016). The questionnaire has been developed to analyse how age and seniority differences affect self-perceived quality of work, so as to highlight the specific issues that need to be addressed by employers in order to guarantee prolonged careers that are also sustainable and productive. The tool

is inspired by the Workability Questionnaire (Ilmarinen, 2006), but it has been developed taking into account the specificities of Southern European companies, as well as of the Southern European entrepreneurial structure and management culture (Marcaletti and Garavaglia, 2014, 2016). The theory underpinning the tool (and the research outcomes it produces) is that age is not the only factor affecting employees' perception of the quality of their working conditions, but also that the strongest influence is explained by the combination of age and the passing of time.

Overall, comparative and country-specific studies on older workers' employment have highlighted that the concerns related to older workers' employment in Southern European countries are connected to social and cultural norms prevalent in the European Mediterranean region (Algan *et al.*, 2005), as well as to the specificities of the Mediterranean welfare system (Ferrera, 1996). These themes, including low activity rates especially of women over 50, widespread long-term unemployment of older workers, low labour market mobility in late-career, negative stereotypes about older workers and a lack of company measures in the age management field, require a comprehensive policy approach that not only aims to postpone the state pension age, but also promotes sustainable and productive prolonged careers. In order to be effective, these policy strategies should take into account the institutional conditions that are typical of these countries, as well as to foster the contribution of employers to active ageing policy objectives.

## DISCUSSION AND CONCLUDING REMARKS

As specified in the Introduction, the objectives of this paper comprised the search for specificity and originality of sociological thinking on ageing by scholars belonging to Southern European traditions or studying the Southern European case. We have also tried to identify future steps from the established theoretical and methodological achievements stemming from other European or extra-European traditions. A further objective was to explain why the Southern European tradition remains relevant.

Regarding the means of advancing the sociological theory of ageing, Marshall and Bengtson (2011) have emphasised some conditions. We recap here the four fundamental needs: first, for more explanatory theories; second, to be aware of previous theorising; third, for more interdisciplinary theories; fourth, to be aware of diversity. We will take these conditions into account in the subsequent discussion.

According to the review of relevant theoretical contributions within the fields of active ageing, adult education and work that we have selected, it is possible to first confirm the originality of the contributions originating in Southern Europe. The humanistic/human-centred approach does not represent an absolute novelty in sociological theorising, but it is undeniable that it constitutes the epistemological foundation of both Freire's critical pedagogy —assumed to be paradigmatic by the Spanish transformative approach in the field of AE (Flecha and Elboj, 2005, 2008; Aubert *et al.*, 2016, Gómez, Puigvert and Flecha, 2011)— and of relational sociology, assumed for studying active ageing amongst the elderly. The human-centred approach represents in itself a criticism of functionalist and utilitarian approaches affirming supranational levels and/or that predominate in other European and extra-European regions, as well as their respective academic traditions (Borg and Mayo, 2008). Moreover, it has been possible to identify the originality of the theoretical and methodological contributions in the age management field in Southern Europe (Marcaletti and Garavaglia, 2014, 2016) with the aim of overcoming the limitations of theories from Northern European countries, that is to say, perspectives that exerted disproportionate influence across the entirety of Europe.

According to the reviews presented in the previous sections, it is possible to argue that not only is the theorising from Southern Europe original, but also that the sociological theories upon which it leans represent a step forward. Given that Freire's work dates from the 1970s, whereas relational sociology was formulated in the 1980s, both contributions represent the origin of approaches explaining society and human action in a new way, and that were later developed and used for further innovation by subsequent generations of scholars.

The new theorising on the relationship between age and work in Italy (Marcaletti and Garavaglia, 2014, 2016), although still somewhat inchoate, can be said to be undergoing the same process, since it gathers the established theoretical approaches and innovates them according to the sociological perspective. In this sense, it represents another example of theory originating within an interdisciplinary context, as is also the case for critical theories concerning adult education (in dialogue with pedagogy) and relational sociology (in dialogue with social psychology).

Concerning the objective of bringing the selected theories from Southern Europe back to Marshall's classification, it is possible to argue that the most relevant contributions rely on interpretative/bridging assumptions concerning the relationship between individuals and society, which adopt micro/meso (linking) approaches. Although the Spanish transformative approach in the field of adult education can undoubtedly be classified as micro and interpretative, its intrinsic formulation in relation to democratic and active citizenship epistemologies also enables it to extend towards the bridging assumptions (see Aubert *et al.*, 2016). The same can be argued concerning the study of the relationship between ageing and work, which take place at the micro and meso (organisational) levels, and in its nature it is interpretative, although taking into account the constraints of the socio-institutional context, it additionally works at the level of bridging assumptions (Garavaglia, 2014; Hofacker, 2011; Van Dalen *et al.*, 2009). At a theoretical level, relational sociology finds in the definition of the relation itself the means of overcoming the dilemma between action and structure, and with it proposes a bridging approach. In spite of its methodological development also extending towards micro level studies, this theoretical approach is best suited to macro/meso investigations, as in the case presented in the previous sections.

Lastly, because most are rooted in human-centred epistemologies, the examples of sociological theorising of ageing from Southern Europe also satisfy the final objective of this paper. In other words, they demonstrate not only originality and innovation, but also their relevance as theories and approaches that can account for the enormous di-

versity amongst individuals. This is the case, for example, for tackling stereotypes concerning age in AE, encouraging the adoption of more holistic approaches to education. Another example can be the criticism both of successful ageing and disengagement theories, through proposing deeper insights regarding individual active ageing strategies. Moreover, these approaches encourage rejection of the culture of quantifying ability to work that has become consolidated in Europe due to the influence of Northern European countries, as well as the stereotyping of generations rooted in Anglo-Saxon influence, through proposing alternative and more human-centred visions.

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## BIOGRAPHICAL NOTES

**Francesco Marcaletti** has been lecturer and researcher at Università Cattolica del Sacro Cuore (Italy), Karshoschschule International University (Germany), Universitat Internacional de Catalunya, and actually he is holding a position as lecturer and researcher in the area of Sociology at the Universidad de Zaragoza (Faculty of Social and Work Sciences; Research group EDUCAVIVA, founded by Aragón Government). Member of the editorial board of the journal *Studi di Sociologia*, his main area of investigation is Economic Sociology.

**Tatiana Iñiguez-Berrozpe** is lecturer and researcher in the area of Sociology at the Universidad de Zaragoza since 2011 (Faculty of Education; Research group EDUCAVIVA, founded by Aragón Government). She is also Assistant Editor of the *International Journal of Sociology of Education* (RISE). Her main area of research is Sociology of Education (Adult Education, Lifelong Learning and preventive socialization through education) in which she has published several papers in indexed journals.

**Emma Garavaglia** is researcher in the area of Sociology at the Faculty of Political and Social Sciences of Università Cattolica del Sacro Cuore (Milan, Italy). Previously, she was postdoctoral fellow at the Department of Sociology and Social Research of Bicocca University in Milan (Italy). She holds a Ph. D. in Organisational and Managerial Studies and her main area of investigation is Sociology of Work and Organisational Sociology.

