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Aging, Work, Learning

Introductory Remarks on the Program and Format of the Work Group

(Monte Verità, January 26, 2006)

We stand at the beginning of a three year work phase, at the end of which public recommendations will be made regarding the theme: “Opportunities and Problems of an Aging Society: The World of Work and Life-Long Learning.” We have the preparatory phase behind us. This phase began in the fall of 2003 with a meeting at the WZB, then was crystallized at two conferences – Marbach and Potsdam 2005 – and supplemented by numerous smaller meetings. The following remarks incorporate the contributions of many discussion participants. Throughout all of this, the initiative of Paul Baltes and Ursula Staudinger has been central. Let me quickly summarize where we stand from my perspective.

The problem: untaken opportunities

Very generally put, the problem, which at the same time represents an opportunity, arises from the following discrepancy: the proportion of population represented by the elderly has grown larger than at any time in human history and will continue to increase. Ever more people reach an older age, and indeed are physically and mentally healthy and fit, at any rate healthier than in the past (at least concerning those ages 60 to 80 years). This represents one side of the discrepancy. On the other side, the order of our society, its institutions and the culture linked to them, as well as our self-understanding and customs are still structured according to another, earlier “age-regime”, to which belong a shorter life spans, fewer elderly, and a greater dominance of the young and adults. For example, our system of work is organized, particularly in labour, such that entry to and

participation in the system are reserved for young and middle-aged people, while older people are, in part voluntarily and in part compulsorily, excluded, although a growing number of them is? capable of work. As another example, our educational system is organized such that learning is concentrated in the early phase of life, as if it were not of concern to offer the incentives and opportunities of learning to people who both live and remain active longer. But from many perspectives – with regard to social participation and politics, supply and consumption, settlement structure and architecture, and also regarding predominant images of different age groups, and their relationship to one another – there exists a clear discrepancy between the possibilities of an aging and healthy population, on the one hand, and, on the other hand, the social conditions under which these possibilities are only poorly realized. This discrepancy is a problem for two reasons.

First, the current order prevents the elderly and aged from realizing the possibilities and seizing the opportunities made available by a longer life and health. In the interest of an elevated, improved quality of life for the elderly and aged, the aforementioned discrepancy must be reduced. As long as this does not happen, reality will lag behind possibility. Untaken opportunities are, after all, problems. In any case, the identification of unseized opportunities, existing problems, and, all the more, any recommendation for change is necessarily normative in nature. Conceptions of a humane life are *constitutive*, if one speaks about the “optimizing” of life and development conditions of the elderly, as soon as one goes beyond the protection of life and health at the elementary level. Is work (if perhaps not paid labour) part of a humane life? And, if so, in what sense? In what sense is autonomy to lead one’s own life independently inalienable or in some way to be traded for the chance of a longer life, per se? Why should one in old age still be burdened with the stress of learning new things and being curious? Furthermore, couldn’t one also take a stand against the vision of a longer, more adaptive, active, self-defining old age, in favour of a right to peace and quiet, or even retrogression? This work group cannot get around discussing quality of life criteria for the elderly and their culture. Perhaps this discussion will sometimes come up in the formulation of if-then statements. We must discuss the relationship between scientific findings, value

judgments and recommendations. This discussion touches upon the basic problems of human existence. On the other hand, the current discrepancy between the possibilities of old age and the constraining structure of society represents a growing problem for the progress and survival of an ageing society in general and, moreover, for its conception of justice and its competitiveness in the trappings of globalization. The systematic negation of the contributions to be made by the elderly and aged to innovation, to wealth creation, to the perception of civil responsibility, to the coherence of a society and to their own ability to care for themselves, as well as the infantilization and marginalization of the elderly and aged poses a growing economic and financial burden, which, not least, shows itself in the increasing costs of welfare policies and the fracturing of the social security system. This means – from a general economic and social perspective – loss of efficiency and, ceteris paribus, a reduced ability of an ageing society to compete, an ability seemingly already reduced in light of an assumed negative correlation between ageing and the capacity for innovation when compared with younger societies. Finally, the discrepancy represents a problem of justice regarding the division of obligations and rights among generations, if the subsidizing of the elderly requires that the welfare of the young be reduced, when this discrepancy does not arise out of clearly different capacities of both groups.

The issues? of an optimized quality of life in old age, as well as the welfare capacity and justice of a society consequently explain for themselves why the aforementioned discrepancy represents a practical problem, which in turn demands a solution.

Goal of the Work Group

The goal of the work group, which is supported jointly by Leopoldina and Acatech and financed by the Jacobs foundation, is to better understand this problem using the best available results of scientific research, and to offer recommendations for a solution. Or, put in practical terms, our goal is to generate recommendations addressed primarily at an audience beyond the concerned scientific community – in politics, society and the public.

Five Characteristics of the Work Group

Through five characteristics of the work group, held together by problem definition and objective, we distinguish ourselves from other initiatives concerned with the problem of age and the generation of practical advice.

1. The systemic approach: The work group concerns itself (a) not only with the elderly phase of life, but rather with its relationship to the whole lifespan. After all, the most important factors which determine a successful or unsuccessful life occur during the younger years. This refers, for example, to nutrition and healthy behaviour, but also to education, motivation and social integration. The work group is concerned (b) not only with the problem of aging and the elderly as a group, but also the relationship among natural, economic, social, cultural and political circumstances, of which they are a part, or which they are intensely tied up to?. The problem exists, as laid out above, not in ageing, or its unique characteristics, but rather in the changing relationships between ageing and – in the widest sense – the societal system. In order to adequately understand the opportunities and problems presented by ageing, the perspective assumed must take into account – for example – forms of business organisation, the theme of “work” between paid labour and activity, the relationship between body and mind, and the conception and system of education both in and outside the school system. In the systemic analysis of these factors lies a special attraction as well as a special claim of this work group.

2. Changeability/Plasticity: The work group aims to produce recommendations for how to effect change through collective action against a background of constant flux, which creates new opportunities and manipulates the problems that concern us. In the foreground of concern stands what behavioural scientists call “plasticity,” and historians and social scientists call “changeability,” variations in the contingency of factors of change, including individual and collective action, as well as individual and collective resources of a biological, cultural, psychological, and social type. It concerns identity development and social constellations Both medicine and psychology, as well as the

economic and social sciences, and, more than ever, the study of law, reflect the capacity of their respective thematic phenomena to change, develop and be optimized – from prevention and therapy via the influence of lifespan as a “biocultural co-constructivism,” (Baltes), to the influential social image of ageing and to the shifting incentives for work and action in mutable social, economic and cultural constellations. A work group, which seeks to produce recommendations for change as improvement must be especially attentive to this perspective. It must at the same time identify and accept the continual and present limits of changeability and plasticity. These are limits which follow from the nature of the body and life-mechanisms, for instance, significantly reduced physical and mental strength and capacity (not at first, but especially in old age), degradation and the *losses*, which mix in a dynamic manner with build-up and development. The limits of changeability – including the unavoidable and unintended consequences of decisions – can be delineated in business, society and politics. In order to be realistic and not become illusionary, the work group will be mindful of the limits of plasticity and changeability.

3. Complexity and a Multidisciplinary Approach: The problem of ageing has many dimensions: medical, psychological, social, economic, technical, political, cultural, and many others. The process of ageing involves interplay between the body, mind and – in the widest sense – society. Whoever wants to understand causes and consequences would be well advised to surround oneself with experts from many scientific disciplines as well as a variety of career and life experiences. The composition of this work group fulfils this requirement to an unusually high degree.

The multidisciplinary approach of the work group substantiates itself in its actions, and it will be condensed in its recommendations. The recommendations will not be scientific texts, but rather interdisciplinary formulations of results of that will be widely comprehensible. It is essential that they be formulated to speak to and to meet with the widely varying expectations of our members. Only so will the work group members stay fully committed for a length of three years. It must stay of interest both intellectually and scientifically.

Our discussions should not be primarily structured around scientific discourses in particular disciplines. It is much more essential to place overall concepts, themes and, above all, problems at the centre of the discussion, which can then lead to answers, connections and additional contributions from the various disciplines. For each specific theme – during every conference – members of different disciplines can and must be brought together. The transition from a multidisciplinary approach to an interdisciplinary approach is our goal. Reaching this goal is indeed difficult, but ought to be possible

4. International Comparisons and Transnational Openness: At the centre of this work group are the opportunities and problems facing Germany. The recommendations will be primarily directed at the German public. This is legitimate. Because the phenomena under consideration have a national-social dimension, in that they differ from country to country, they are “path-dependent” in light of national history. For the foreseeable time, political action will continue to take place in the framework of the nation-state, influenced by a national-language specific public. At the same time, however, these issues involve transnational phenomena, which are not limited to Germany, but rather are shared with other European countries as well as with other industrialized societies, or are linked globally (if not universal around the globe). One and the same phenomenon – for example, slowed population growth, which contributes to the increase in the proportion of the population made up by the elderly – appears on the global level under a different light when compared with the national perspective. The work group will pay appropriate attention to this the transnational dimension of the problems. On the other hand, it is also concerned with international comparisons. The identification of similarities and differences between Germany and other comparable countries will allow us to recognize the particularities of our own situation, to better analyse causes, and to learn from the experiences of other countries with a view towards the recommendations to be developed. In light of this, comparisons with drastically ageing societies – in Europe and East Asia – may be particularly useful. Overall: the work group must, as often as possible, look beyond national borders, incorporate international comparisons and take into account transnational processes like Europeanization and Globalization. We must find ways to

attract expertise from other countries, through the participation of foreign participants in conferences, and in other ways.

5. Despite its systemic orientation and its multidisciplinary approach, the work group cannot address every issue at hand. It is primarily interested in the world of work and in life-long learning. From these two focal points, or central fields, other areas will be developed and tied in. Altogether, however, the work group aims at a integrating a broad panorama and synthesizing differing phenomena.

Program and Procedure

We have used the preceding year to agree upon of the content of the research areas. Following the theme of today's conference "Ageing, Work and Business" (June 26-28, 2006) are:

- "Body, Mind, Health, Brain" (May 25-27, 2006, Schloss Marbach)
- "Productivity, Competitiveness and Human Capital in an Aging Society (September 28-30, 2006)
- "Ageing, Environment, Technology and Urban Development" (January 25-27, 2007)
- "Images of Ageing in Flux" (May 17-19, 2007)
- "Ageing, Education, and Life-Long Learning" (September 27-29, 2007)
- "Ageing, Civil Society and Politics" (tentative January 1 – February 2, 2008)

An eighth theme is also on the horizon: "Ageing, Technology, Products and Services". The second half of 2008 will serve to finalize the interrelationship among the research areas and to formulate our recommendations. We must decide how far we can and want to go in incorporating the problems of "ageing and the welfare state or social security system." At the very least this will be necessary in relation to the research areas "work"

and “learning/continuing education.” Several expansions of, as well as limitations on content will be possible and, to some extent, obligatory.

At the centre of our work will stand two- or three-day conferences per year, each of which will be dedicated to one of the aforementioned themes. Each conference will be led by a different member of the work group, but in cooperation with the board (currently, J. Kocka as chair, as well as P. Baltes, K. Kochsiek, J. Schnitzer-Ungefug and U. Staudinger; with support from R. Heuer). For each conference and, respectively, for each research area, a research associate will be assigned, who will assist in the preparation for and management of a given conference. He or she will also see to it that, before and after the conferences, the research areas stay on the agenda, and are expanded and deepened through further research, interviews, hearings, etc., and that they find their way into the final recommendations. While the recommendations will be presented in three years, an interim report for the foundation will be due after a year and a half. A public presentation of interim results may make sense, but should stay limited, so that it does not forestall the final recommendations. The results will be, in the strictest sense, scientific results and suggestions from scientific research, which will be published separately. **The steady participation of work group members – and junior members – is essential.** Moreover, guests, experts and conversational partners will be invited to several conferences.

This work group concerns an ambitious undertaking of a special sort in the overlap between scholarship and publicity, knowledge and society, as well as many scientific fields. Two academies are involved, and we have made commitments to the foundation supporting us. The work group thrives on idea, knowledge and the regular engagement of its members.

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