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RESEARCH ARTICLE

Ageing in transition: Potential influences of the framing of active ageing on the life of older people

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Pelle Korsbæk Sørensen[1], Ulla Skjødt[1], Vibeke Østergaard Steenfeldt[1], Stine Gundtoft Roikjær[1], Jonas Christensen[2]

[1]Centre for Health, University College Absalon - Campus Roskilde, Roskilde, Region Zealand, 4000, Denmark
[2]Social work, Malmo University Faculty of Health and Society, Malmö, Skåne County, 205 06 Malmö, Sweden

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Abstract

Background

Across Europe, a rapidly ageing population and a shrinking working-age group have raised concerns about the future sustainability of welfare systems. Growing numbers of older adults and a reduced labour force are expected to increase demands on long-term care and healthcare. In response, old-age policy has become a political priority, and the European Union has introduced strategies such as active ageing. This study examines the political value base of an active ageing discourse and explores how it shapes ideas about what constitutes a "good" older adult.

Methods

A discourse analysis inspired by the Foucauldian notion of problematization was conducted on statistical and policy-focused EU documents concerning ageing. The analysis sought to uncover how the texts describe older adults, their responsibilities, and their roles in society.

Results

Three central issues emerged from the analysis: societal obligations in later life, expectations of good health, and the economic foundations of active ageing. The findings show that the selected EU documents present ageing through an overarching expectation that older adults should remain active, minimise reliance on welfare services, and

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1. **Philip Taylor**, University of Warwick, Coventry, UK

2. **Eralba Cela**, University of Milan, Milan, Italy

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continue contributing to society for as long as possible. This discourse is grounded in an economic rationale that positions active older adults as essential to alleviating financial pressures associated with demographic change. As a result, productivity and independence are elevated as central qualities of later life, shaping how ageing is framed and valued within the texts.

Conclusions

The study demonstrates how the discourse constructs a normative ideal of active ageing that may influence how older adults perceive their roles and obligations. While promoting participation, the discourse gives limited attention to the diverse circumstances, capacities, and forms of wellbeing that characterise older adulthood. Such economically oriented framings risk narrowing understandings of ageing and overlooking broader perspectives on what constitutes a good later life.

Keywords
Active ageing, EU policy, Old life, Retirement, Activity

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Corresponding author: Pelle Korsbæk Sørensen (pkso@pha.dk)

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Introduction

Due to a rapidly ageing population, there is a concern about future social costs in European welfare states (e.g., European Commission, 2020; Hellevik & Herlofson, 2020; Rechel *et al.*, 2013). A decline in the birth rate in the European Union (EU) is dramatically changing the balance between older adults and younger people, and it is estimated that from 2019 to 2070, the share of people aged 80 or over is projected to more than double to 13%. At the same time the working-age population (20–64 years) is projected to decrease. In 2019 it amounted to 59% and by 2070, it is projected to be 51% (European Commission, 2020). This scenario has implications for welfare systems, which will see, for instance an increase in expenditures on long-term care (European Union, 2020; Rechel *et al.*, 2013) and the healthcare system. Thus, old-age policy is on the agenda in the EU and member states to engage in developing innovative and progressive ideas designed to solve these challenges (Colombo *et al.*, 2011; Sánchez & Díaz, 2021). In order to understand the present better, in the main analysis in this article we go back in time to uncover the embedded norms from when the term *active aging* was framed and became a political term for policy makers to use. The 2012 European Year Active Ageing and Solidarity between Generations which addressed finding ways to deal with the demographic challenges the EU faces, represents an important political statement on the implementation of applicable and effective policies (Walker & Maltby, 2012) and focused on active ageing to develop methods for successful living in old age (Barslund *et al.*, 2019; Fritzell *et al.*, 2020; Rantanen *et al.*, 2019; Rowe & Kahn, 2015).

A historical perspective on active ageing

Active ageing as a concept has its origins in gerontology after World War II and correlates with a neoliberal current in the West that embedded the economy as a target indicator (Katz, 2003). Since the 1950s, gerontology research has been preoccupied with the concept of activity and the notion of successful ageing (Havinghurst & Albrecht, 1953). Havinghurst (1961), who points out that the aim of gerontology is to provide societies and older adults with advice to make constructive societal and individual choices regarding, e.g. retirement policy, housing, family relations, and hobbies, asserts that, it is essential that gerontology have a theory of successful ageing (p. 8). In this regard, activity theory plays a role, emphasizing that older adults should continue to be socially and physically active for as long as possible and replace with new activities for ones that are no longer possible (Ibid.). Disengagement theory, on the other hand, which can be applied to help understand successful ageing, embraces the acceptance of ageing, where individuals undergo a process of withdrawing from active life compared to what they engaged in when middle-aged (Havinghurst, 1961). Katz (2000) points out that due to demographic changes, however, professional practices, gerontological research, and popular opinion define being active later in life as successful ageing, effectively dismissing disengagement theory, which addresses physical, cognitive, and psychological functioning (Walker, 2015). Research reflects this focus by primarily defining successful ageing as encompassing an active lifestyle to prevent medical diseases and physical disabilities as opposed to embracing social, cultural, and civic activities (Annear *et al.*, 2014). The notion of active ageing conveys a positive ideal with connotations concerning the optimization of life, however it is challenged by more critical analyses with connotations of passivity (Katz, 2000) and biopower, where the well-being of the individual, i.e., the body, is a state matter (Dean, 2009; Foucault & Senellart, 2008)

Perspectives on activity and older adults

Evidence shows that activity has a positive impact on mental health, well-being, cognitive impairment, self-esteem, feelings of belonging, and mobility (Smith *et al.*, 2018). Marhánková (2019) points out that activity in old age, such as grand mothering, is associated with not only caring for grandchildren but acting as a mediator who does activities, for example introducing new hobbies targeted the grandchildren's development, which can leave grandparents unable to do so stigmatised. Framing activity as a positive norm later in life contains the embedded assumption that the third and fourth age can be restructured with new possibilities. The fourth age is a period when, "infirmities and dependencies associated with ageing take their toll" (Higgs & Gilleard, 2014, p. 13). Gilleard and Higgs (2011) relate abject bodily decline in the fourth age to losing the ability to perform expected bodily activities, while Pack *et al.* (2019) suggest that the focus on physical and cognitive health is "a response to the inescapable threat of independence, decline and loss of agency" (p. 2085).

Politically, independence in old age is praiseworthy in the West since older adults maintain their autonomy. In an analysis of Norwegian policy documents, Jacobsen (2017) uses the term "productive activities", which includes participating in the labour market, exercising and physical training, or volunteering, while the activities that older adults often find highly valuable, like reading the newspaper, watching television, or playing cards, do not seem to be deemed beneficial. A study of 34 older adult Canadians shows that, despite bodily dependency, they strive to remain independent by caring for themselves as much as possible (Barken, 2019).

The aim of the study is to contextualise and problematize the value base of ageing within the political context of active ageing to clarify how these values potentially influence the lives of the individual older citizen.

Method

The 2012 European Year Active Ageing and Solidarity between Generations represents an important EU political statement that affects the implementation of national policies (Lassen & Moreira, 2014; Walker & Maltby, 2012). Given this, inspired by a Foucauldian (2003) approach to problematization, we conducted a discourse analysis of two key EU policy documents released during European Year 2012. Via a discourse analysis of the texts, we outline how the documents communicate a description of a 'right way' of being active as an older adult, in order to show how the texts define what is valued politically as a *good older adult* and, thus, the *good old life*. In Foucauldian

terms, problematization guides the analysis beyond identifying dominant themes; it examines how truths about ageing are produced through policy objectives, statistics, and moral appeals.

In the documents the group we analyse is defined as *older people.* In the light of contemporary research on ageism, the authors of this article will use the term *older people* from the documents. In addition, inspired by the WHO's report on ageism (WHO, 2021) and the scientists at the European Commission's Joint Research Centre (JRC, 2024), we also use the expressions *older persons* and *older adults*.

The two documents are what we designate as Report 1, "Active ageing and solidarity between generations: A statistical portrait of the European Union 2012" (EUROSTAT, 2012), which describes incentives and ideas to participate in society in general, and what we call Report 2, "Active Ageing" (Special Eurobarometer 378, 2012), which presents the results of a survey comprising 31,280 respondents over the age of 15 years from all 27 member states and five non-EU member states: Croatia, Iceland, the former Yugoslav Republic of Macedonia, Norway, and Turkey. The reports present the views and attitudes of Europeans towards older adults, including their contribution to the workplace and society in general. The aim of the reports is to raise awareness and exchange best practices in Europe by encouraging key players to make a concerted effort to create a society where older people can play their part.

Both reports stress that they do not represent an official policy position of the European Commission. Politically, they are nevertheless central to the concept of active ageing as they convey an embedded normativity about how to be a good older adult and citizen in the EU. Furthermore, they aim to inspire EU member states to find solutions and suggest incentives to tackle the demographic of an ageing population and its accompanying economic challenges by encouraging active ageing.

In order to make the analysis relevant for the present, we contrast the findings from the initial documents with a similar document from 2019. In a complementary analysis we revisit the findings from the analysis of the documents from 2012.

To problematize EU policy on active ageing our study examines the following questions:

What are the explicit and embedded values, skills, and demands of active ageing that the two EU documents present? How is ageing articulated implicitly and explicitly in EU the reports?

How is activity articulated implicitly and explicitly in these central EU documents?

Foucauldian methodology and problematization

Problematization in Foucauldian methodology involves linking to discontinuity and discourse to make it possible for researchers to confront current societal norms and power structures by examining the embedded forms of rationality developed in the past, which inherently means examining historical developments and language (Foucault, 2020).

Various philosophers and political theorists include problematization as a central part of their analytical methodology, e.g., Bacchi (2009; 2015), who outlines how analysing documents can aid in understanding and analysing discourse. Like Bacchi (2000), we are interested in the explicit and hidden assumptions and the norms communicated in the two reports, but also the subjectification that those assumptions and norms entail.

The historic aspect of problematization involves tracing how specific ways of governing came about (Dean, 1995). Originally linked to the practice of genealogy in theory, problematization is historic and philosophical in nature and can shed light on what occurs both beyond and below what is apparent. Genealogy concerns visualising and articulating essential problems (Foucault, 2003; Koopman, 2013) and, in the context of this study, tracing and problematizing the values, skills, and demands linked to the political notion of active ageing (e.g., Katz, 2000; Lassen & Jespersen, 2017). Furthermore, genealogy includes a realisation about what is conveyed as political truths, thus influencing societal norms. What is conveyed as political truths influences the lives of individuals (Foucault, 2020). Importantly, Lassen and Moreira (2014) discuss in a more historical context how the term active ageing came into being at the World Health Organization (WHO) and in the EU. Our approach does not involve an archaeological search of texts from the past, neither is it a full genealogical analysis of the term activity. Instead, we employ problematization since it is about how something becomes an issue to be addressed (Foucault, 1980a; Koopman, 2013). As such, the concept of problematization is not only linked to a historical analysis.

Although Foucault (1980b) describes the idea of problematization, he does not provide a specific methodology or instructions to follow; he did not, as Riemann (2023) asserts, provide scholars with a methodological blueprint. As a result, our methodological approach is inspired by some of his interviews (du Plessis, 2021; Foucault, 1980b) and lectures, e.g. his concluding remarks from lecturers given at the Discourse and Truth seminar at Berkeley University in California in 1983, where he describes problematization in terms of methodology (Foucault, 2001).

Analysis

In accordance with Foucault and Bacchi, we begin based on a *problem in the present* by going back a little more than 10 years to draw meaning from two documents that frame a period when active ageing became a prominent term and point of reference for policies. The documents from 2012 will outline the analysis, and they will be the starting point. At the end of the analysis, we supplement the main analysis with an analysis of whether later a comparable document from 2019 continues the normative dimensions embedded in the documents from 2012.

Our study confronts history with the present by analysing specific problematizations of the contemporary political understanding of the older population in general based on specific selected texts. Designed to let the two documents speak for themselves, our analysis was based on an iterative process that involved reading the documents several times to gain an overall impression to ultimately achieve in-depth insights into the concepts, phrases, and diction they contained on active ageing. We identified relevant words, sentences, and phrases representing the explicit and embedded values and norms, skills, and demands that established the content of active ageing politically. We took a dual approach to reading the texts, which began with an analysis of their main concerns followed by an in-depth analysis that resulted in the identification of three different yet interdependent problematizations concerning active ageing: societal obligations in later life, the expectations of good health in old age, and economic aspects embedded in the ideal of active ageing. Inspired by (Foucault, 2003; Katz, 2000), the analysis clearly showed what the associated strategies and potential power issues were at a political level in the EU, allowing identification of the conditions that influence the life of the individual senior citizen.

These three issues capture what is described explicitly and implicitly in making active ageing a part of the solution to meet the societal challenges of an ageing population. Based on the Foucauldian notion of problematization, we analyse how the texts describe active ageing as a solution to some of the complex issues that EU policymakers must address.

In the following, our three-pronged analysis examines *Report 1*, "Active ageing and solidarity between generations: A statistical portrait of the European Union 2012" (Eurostat, 2012) and *Report 2*, "Active Ageing" (Special Eurobarometer 378, 2012).

Societal obligations in later life

Politically, tackling the increasing number of older adults in the EU involves inspiring them to contribute by becoming involved in society by adding social and economic value (Report 1, p. 111). Report 1 stresses the idea of helping older people to stay active in the labour force by delaying retirement and in general by participating in social, economic, civic, and cultural activities.

The two reports aim to optimise the opportunities available to older adults and their resources by encouraging them to actively participate and play a role in society, which indicates that their quality of life seems to depend on engaging in certain activities. Becoming an 'active ager' includes taking on obligations in society on various fronts, with an overall embedded pressure to adopt a lifestyle based on stimulating efficient lifelong learning strategies (Report 1, p. 11). In other words, EU member states are supposed to encourage people to be open to new ideas, also new technologies, to stay in the labour market via incentives in employment policies and the improvement of human capital through better education and skills (Report 1, pp. 2, 3, 8–9, 11).

The active participation of older adults becomes a means to respond to societal and economic challenges based on various kinds of political incentives. Report 1 states, for example:

"*Active participation of older persons may be promoted through a range of initiatives, such as: encouraging the retired to take on part-time work, engaging older persons in community initiatives and voluntary work, or adapting fiscal systems to recognise informal care that is provided by older persons (for example, child minding)*" (p. 111). The delivery of informal care seems to have a positive impact on the social economy since it allows parents to remain in the labour force and grandparents to contribute to their family's well-being (Report 1, pp. 112, 117), letting the latter play their part in establishing solidarity between the generations.

Thus, lifelong learning turns out to be an essential underlying concept in political incentives by valuing individual readiness to continue to develop to provide for society in the third and fourth ages. This makes embedded expectations toward older people susceptible to external societal encouragement, prompting their active contribution to society in the labour market and civil society, e.g., by doing volunteering and caring for the family (Report 2, pp. 3, 88).

In the reports, lifelong learning proves to be quite specific and a substantial foundation for framing what is valued politically, i.e., active seniors, implying a showdown with the historically rooted societal acknowledgement of older people as having already done their duty in and for society. Contemporary societal trends concerning older adults support them living actively by co-creating and being resourceful, with a focus on personal development based on policies that promote lifelong learning. On an interesting note, To advance this narrative, the cover of Report 1 underpin this narrative, as it shows an older adult clad in a sports jersey with a bib number, his face radiant with the effort to keep on running in the race. Inside the report, an old painter smiles, apparently because he still enjoys being on the labour market (Report 1, p. 36), while another photo shows an older adult reading a book with a child (Report 1, p. 110). These pictures show typical ideal activities for seniors: stay active and contribute to society. Being active is acknowledged, whereas the inability to be active seems to be ignored. In addition, social capital is defined as highlighting relationships that promote cooperation, implying that a collectively generated public good is derived from the activities of individuals who vigorously remain a part of the community and social networks. Promoting social capital involves participation in civil society, e.g., in charity organisations, non-profits, professional or business associations, and sport organisations (Report 1: pp. 111, 118).

Based on our analysis, Report 1 portrays lifelong learning as based on specific goal-oriented activities, bolstering the idea that embedded civil obligations support reaching the overall political aim of adding economic value to society. The underlying argument and incentive for depicting lifelong learning

in the elderly in this way is that being active per se apparently has a considerably positive influence on their well-being and self-worth, reducing the risk of becoming isolated and loosing self-confidence or self-esteem (Report 1, p. 111). In the reports, there is the embedded idea in terms of well-being and health that all senior citizens have the physical and mental ability to live up to what the reports expect, i.e., of behaving in a manner the reports deem appropriate. Older adults who cannot adapt to this definition of lifelong learning seem to be overlooked since they cannot live up to the demands of independent living, which is defined as living without using welfare services, which in turn reduces expenditure by the state (Report 2, p. 3). This also reflect in Report 1, which states:

"*Within some of the EU Member States there are a range of policies designed to encourage older people to remain in their own homes for as long as possible, so they may keep their independence; older persons may also like this idea – perhaps for sentimental, rather than practical reasons. The effectiveness of such an approach depends, at least to some degree, upon the housing stock and whether this can be renovated and modernised in order to match the needs of older generations* (p. 94).

Independence is framed as not being dependent on care that the state provides, which means living without the aid of public services in one's own home or having to move into a nursing home or residential care facilities. Report 1 contains activity-driven language, where innovation, economic growth, and health promotion are central, as are how to enable and empower people, and how to create policies that can drive the economy forward. The discourse in the reports implies that senior citizens with infirmities who can no longer live independently are an economic burden for society, but as life expectancy increases, state-funded care for this group is essential.

The analysis shows that the reports put people into two categories, activity ready or passive-docile, but this dichotomy does not leave room for the manifold ways in which people can be active or address the diverse life situations that arise as a result of a long life, e.g., life experiences and multifaceted physical, cognitive, and psychological impairment. Report 1 nevertheless aims to encourage older adults to contribute actively and play their part in contributing to society. Most importantly, the reports promote fostering a change in societal attitudes and policies (Report 2: pp.1, 3, 45), which risks neglecting the diversity of the individual old life.

The expectations of good health

Health plays a significant role in Report 1, which applies the WHO's broad definition of health incorporating physical, mental, and social well-being. Physical activity is presented as one way to improve the quality of life of older people as regular physical activity can potentially improve physiological and mental health (Report 1: p. 120). Report 1 emphasizes that active ageing while employed and after retirement will only happen if people age in good health (p. 11) and that the aim to enable EU citizens to lead healthy, independent lives while ageing actively (p. 12). This vision seems to accentuate that good health is the primary means to stay independent (of public welfare services) by being active (doing predefined activities). Report 1 highlights, "[…] *prevention and health promotion, integrated care as well as active and independent living for older persons"* (p. 12). The state must encourage people to live a healthy and an independent life, which is understood as not being dependent on public services and volunteering e.g., by caring for the elderly in need of long-term care. The reports imply that what older people do must be guided in a certain direction, which is argued to be beneficial for both the individual and the state. This approach leaves EU states with the task of enabling and encouraging older citizens to live healthy lives in specific ways.

Being and staying healthy represents one of the main pillars of having an active life as an older adult in the EU, as indicated by the three ways Report 1 suggests society can play a role in the health of older people: "*help create better job opportunities and working conditions*"; "*help them play an active role in society*"; and "*encourage healthy ageing and independent living*" (p. 9). The last suggested improvement is directly linked to health and healthy behaviour. The word 'encourage' is of interest because its meaning is open-ended and carries a normative message. The report is particularly aimed at policymakers, but member states are left to ensure that these improvements happen. How, then, should the word 'encourage' be understood, in terms of *incentives* or of *obligations*? The former can be understood in economic terms, where rational individuals are given reasons to act in certain ways to maximize their benefit.

Based on the theories of Foucault & Senellart (2008) and Dean (2009) this (soft) vocabulary exemplifies a form of biopolitical governance in which health promotion operates through self-motivation rather than direct political guidance.

Another way of stimulating improvements is via a more ethical or moral proposals, which makes the individual aware of their personal obligation towards living a healthy life, where more than just one's own personal well-being is at stake. Individual good health becomes the interest of society as a whole since it leads to lower welfare costs. The introductory chapter of Report 1 highlights the main goals of a broader Europe 2020 strategy (p. 12), with *Innovation Union* described as a flagship policy due to its objectives. Via this initiative, stakeholders are expected to join in and support European Innovation Partnerships (EIPs). In this case, innovation involves making the states competitive and securing economic growth. The first objective of EIPs is for active and healthy ageing to "enable EU citizens to lead healthy, active and independent lives while ageing" (Report 1: p. 12). In other words, a link is made between individual health and behaviour, and the economies of the member states, an issue that we address in the next section.

The economic foundations of active ageing

The third issue in our problematization is the relationship between securing an economically sustainable future for EU

states and the individual aspects of living an active life. Both reports point out that demographic changes in EU member states regarding the steady increase in life expectancy leading to progressively more older adults in the future will have serious implications for public policies and budgets (Report 1, p. 7; Report 2, p. 3). The ageing population challenges EU member states (Report 2, p. 3) by "aggravating adverse budgetary development" (Report 1, p.7). Some of the incentives for responding to the challenge mention in Report 1 are encouraging older people to work longer and delay their retirement (p. 8) to save on public pension costs. The EU states are supposed to encourage active and independent living via various incentives and better employment policies by improving education and skills (Report 1, p. 11). The workplace, for example, should offer training and encourage older adults to remain active by working longer and retiring later. Raising employment rates and productivity and reforming pensions, healthcare and long-term care systems could play a part in this regard (Report 1, p. 9). The EU's employment strategy seeks to establish a lifecycle approach, putting in place conditions that allow people to prolong their working lives by raising the average retirement age to facilitate an active life longer, also by ensuring adequate incomes in retirement and making sure pension systems are sustainable in the long term (Report 1, p. 11).

Report 1 describes how poor health can lead to early retirement (p. 73), which it also describes problematic when a longer working life is positively correlated with economic benefits for the state. The report sums up the connection between the two in three ways:

"*As such, maintaining the autonomy and independence of the elderly generations has become a goal for some policymakers, as better health has the potential to:*

- improve the well-being of individuals;

- extend their working lives – providing a stimulus for economic growth;

- reduce the overall strain on health and social care systems." (p. 73)

As described above, well-being can be based on good health, but well-being is a broader concept that comprises more than just good physical health. Better health is described as a driver of positive factors on an individual level but also on an economic and societal level. Besides enhancing well-being, better health can stimulate growth and reduce expenditures by the state by putting less strain on the healthcare system and the social care system (Report 1, p. 73). Good health and the individual's role in maintaining and supporting the system are clearly mentioned in central passages in Report 1, where the introductory chapter describes good health as a prerequisite of the overarching concept of active ageing, summed up as: "*Active ageing, both in employment and after retirement, will only happen if people age in good health*" (p. 12). The relationship between macro-economic effects and actions at the micro-level becomes evident. Report 1 explicitly states that countries must commit to tackling health inequalities and promote healthy living (p. 73).

The economic benefits of people living a healthy life

Our analysis shows that national economic concerns are linked to policymakers becoming aware of promoting good health in the older population. We find that maintaining good health becomes a normative obligation for citizens as portrayed in the two documents we examined. There seems to be an implicit contract between the state and the individual that the individual must stay healthy. In addition, this applies not just to the older population; it is an obligation for everyone at all ages. This approach to healthy ageing via health promotion is summed up in Report 1 as: "*the promotion of health over the whole of an individual's life, aiming to prevent health problems and disabilities from an early age*" (p. 73). This type of encouragement is presented as an invitation to embrace certain actions that the individual feels compelled to follow.

Individual health becomes problematized as a matter that is everyone's concern. Although being in good health is an individual obligation, it is framed as a shared 'problem'. This, in turn, makes the individual body the object of interest, making health promotion a mediating concept. Our interpretation of the data indicates that the state should promote healthy living and develop policies for active ageing. The individual then has an obligation to be healthy to continue to actively participate in the workforce and in old life. This finding corroborates previous analyses, where the problematization of the 'good' active ager entails a normative expectation that the individual should be active via participation in informal care and in civil society.

Complementary analysis

To extend the analysis of the initial documents into a more contemporary context, we include the publication *Ageing Europe - Looking at the lives of older people in the EU*[i] from 2019 (Eurostat, 2019; also see Eurostat, 2020), which is a statistical book from Eurostat. The text mirrors the selected texts from 2012 as the publisher is the same and the kind of publication is similar. We label this *Report 3*, following the previous analysis.

The first step in this part of the analysis is to consider, whether active ageing is still in effect. In the *Introduction* under the headline *EU policy* the main concern of the report is described: "*With populations ageing across Europe, pensions, healthcare and long-term care systems risk becoming financially unsustainable, as a shrinking labour force may no longer be able to provide for a growing number of older people*" (Report 3, p. 9). This is very similar to the concerns based on the demographic development stated in the reports from 2012. In addition, the report from 2019 defines "*active ageing"* in line with

[i] A second version of the report was released in 2020. The 2nd edition added gender dimension to many of the statistical indicators. In the following chapter, we will analyse the original report from 2019.

the findings from our analysis of the texts from 2012. In the report they write: "Active ageing is the European Commission's policy directed towards '*helping people stay in charge of their own lives for as long as possible as they age and, where possible, to contribute to the economy and society*'". (Report 3, p.9, single quotation marks form the report). This presents two important findings. First, *active ageing* is still the term used seven years after the *European Year for Active Ageing and Solidarity between Generations* (2012), and it still has a direct impact on policy making. Second, the basic understanding of autonomy is linked to older people contributing to the economy and society within a rational resource perspective. Nevertheless, we trace new openings in the underlying normative in the verbalisations of the expected obligations of the older people in the document.

In the comparison of the documents over time we are interested in revisiting the three problematizations we found via the analysis of the documents from 2012: *Societal obligations in later life*; *the expectations of good health*; and *The economic foundations of active ageing.* In the report from 2019, the two first problematizations are intertwined. The third can be analysed separately.

Societal obligations in later life and the expectations of good health - revisited

In the *Foreword* to the publication from 2019 the findings are presented on half a page by the Director-General of Eurostat. She writes:

"*As Europeans expect to live increasingly long lives, their attention turns to how they can make the most of their retirement. Growing numbers of older people engage in some kind of meaningful activity or employment: some take-up new pastimes/sports or learn new skills, others decide to volunteer or travel, while some may work on a part-time basis. Studies confirm that older people are more likely to maintain their physical and mental health by remaining active and preserving their social contacts; this may also improve their chances of a happier retirement with higher levels of life satisfaction*" (Report 3, page 3, introduction)

The quote presents a view on "older people" that emphasizes activity in different forms. The wording seems oriented towards the individual life of the citizen. Like in the texts from 2012, the social obligations of the individual are present in the text from 2019, however, in comparison they are played down. The expression of how older adults can '*make the most of their retirement*' somewhat resembles an individualistic and rational approach to the way the subject acts in the world, in line with the rational choice theory of modern economics. The description of making reframes ageing as a personal optimization project, signalling a discursive shift from societal duty to individualized life management.

The analysis of the documents from 2012 presents the finding that economics is related to the society as a whole. In the report from 2019 the action of the older individual is linked to development of skills and employment, and later in the document, to the phrase *return to education*. Yet, this is not just simply about life-long learning in relation to making use of one's talents in terms of optimisation in the eyes of society. In this respect the next phrase in the *Foreword* is of interest. In the report from 2019 *Pastimes*, *sports* and *travels* are mentioned alongside civil participation such as *volunteer*ing or *part-time* work, which in different ways, otherwise, can be seen as supportive activities of society and the state as a whole.

The same goes for the notion of maintaining a healthy body and good health. The aim is maintaining a physical and mental health via being active and social. The word *active* is not directly connotated with being productive in an economic sense. This is further accentuated as the Foreword ends with the description that older adults can have "*a happier retirement*" and "*higher levels of life satisfaction*" (Report 3). These sentences refer to positive and individual mental states.

Chapter 6 (p. 127–157) in the report from 2019 is titled: "*Social life and opinions*". First, physical activity is stressed as important in order to have and keep a healthy body. Further, participation in cultural activities is linked to enhancement of the quality of life of the citizens. The examples stress the positive effects of keeping fit, engaging in social activities and lifelong learning for older adults. It is mainly individual benefits, that are mentioned. The direct connection to the benefits of society is less evident in this chapter compared to the language of the report from 2012.

The economic foundations of active ageing - revisited

In the *Introduction* of the document from 2019 a steady rise in the number of people above 65 years of age in the European countries in general is presented. Somewhat surprisingly in relation to the to the idea of a demographic challenge, the report describes why this increase in one way can be understood as success story, as it is due to positive changes in the living conditions, healthy lifestyles, better working conditions, and advances in health. Next, the pendulum swings back as the increased burden of an older population on government finances is mentioned: "*With populations ageing across Europe, pensions, healthcare and long-term care systems risk becoming financially unsustainable, as a shrinking labour force may no longer be able to provide for a growing number of older people*" (Report 3, p. 9). Later in the report, the concerns of policymakers regarding the demographic development in the EU is addressed directly and more elaborate in chapter 5 (p.97–125). Here, the risk of poverty and the ability to face unexpected financial expenses by some groups of older people are presented as possible and real effects to be considered by policymakers.

Nevertheless, in the introduction it is recognised that what was previously called a demographic burden, should be looked upon in a more nuanced way. Today, in the post financial crisis, a growing share of older adults are facing fewer risks. It is stated that some member states experience: "*a growing proportion of older people being relatively well off, which could result in a 'demographic dividend', insofar as ageing populations*

may choose to spend more." (Eurostat, 2019, p. 8). In addition, in the *Introduction,* which frames how to understand the following chapters, it is mentioned that some observers think that an ageing population does not necessarily impede economic growth due to other effects in the market.

In sum, the political language of the politics of necessity, of an immediate risk, and of grave future economic burdens are played down and less directly addressed in the economic background analysis in the introduction of the document from 2019. This is a change in discourse in comparison to the previous analysis.

Discussion

Katz's (2000) analysis of busy bodies sets a new agenda by emphasizing activity as a measure of successful ageing, primarily from an economic perspective related to neoliberal currents (see also, e.g., Lassen & Jespersen, 2017; Lassen & Moreira, 2014). Politically, active ageing is framed as involving specific actions to achieve successful living, including being able to live independently of public services and contributing to society, e.g., by volunteering. Embedding the concept of active ageing in the understanding of being an ageing citizen requires society to accept that developing throughout life is essential, which also involves the political goal of society accepting that lifelong learning is imperative. The concept of lifelong learning is both explicitly and implicitly part of the economic objective of EU member states, which means it is directly connected to the individual's way of living, although a more explicit holistic understanding of health is politically expedient, which is reflected in the use of the WHO's definition, which also includes the social and psychological aspects, not just the aspects concerning bodily health. Political goals, however, are framed in a specific way to guide policies on active ageing within an overarching economic factor, similar to how it is embedded in the neoliberal approach (Foucault & Senellart, 2008). From a macro perspective, the states are expected to encourage and enable people to live healthy lives that primarily focus on biological health and doing predefined activities. This means that the individual older individual is expected to act and engage in certain activities to live in an optimized way, for example by volunteering, providing care, and/or continuing to be live independently without the aid of welfare services, ultimately with the goal of contributing financially to society.

According to our analysis of the documents we studied, becoming a valuable 'active ager' in society requires acting in accordance with a predefined concept of lifelong learning, which implicitly makes older people passive or independent, implying that they are only an expense to society while overlooking the psychological and social aspects. One of the goals of the reports appears to be overturning the long-lived idea and traditions embedded in society that retirement is when people get to relax and take a laid-back approach to life. According to the previously embedded notion of old age, the assumption is that people gave to society throughout their lives, just as there was an acceptance of the biological clock running out and that the entailing infirmities that arise are multifaceted and in no way uniform in old age.

The connection between the state and the individual older adult can be captured by the notion of biopower, which emerged as nation states developed (Foucault & Senellart, 2008) and connects the well-being of the individual to state matters. Dean (2009), who links biopower directly to what he describes as the norm of optimization of life, maintains that all modern states should be understood via their attempt to articulate policies aimed at enhancing the life of their population (p. 120). Our analysis shows that bio-politics is articulated as soft power making suggestions. The written words in the policy reports contain an explicit meaning, but smouldering underneath is an implicit but powerful normative idea that connects civil and biological health obligations, pointing to the existence of underlying economic arguments. Following the methodological framework of the Foucauldian notion of problematization, these subtle forms of governance can potentially reach into intimate aspects of everyday life, shaping how older citizens understand autonomy, usefulness, and the meaning of a 'good old age'. A combination of the main arguments in the reports can be summarised as the obligations assigned to the individual to remain healthy and active, but this requires strong informal care based on civil participation and good biomedical health to be able to contribute to a stronger, more efficient, and resilient society.

In a groundbreaking report from 2021 titled *Global Report on Ageism* (WHO, 2021) the World Health Organisation (WHO) presented a coherent description of how stereotypes can be verbalised and conveyed explicit or implicit – with or without intent. The report tells a story of the possible damaging effects of such stereotypes. Further, the report warns against a situation where ageism pit one generation against another. We hope that our analysis sheds light on both the risks and the possibilities that the reports present via implicit norms and understandings of what a 'good' older member of society, is to be understood as, via the lenses of statistical EU reports. Our research question led us to an analysis of *the explicit and embedded values, skills, and demands of active ageing in EU documents for policy makers.* This is mainly a descriptive analysis. However, further analyses could be conducted based on a research question that includes the notion of ageism.

Conclusion

The aim of the study is to contextualise and problematize the value base of ageing within the political context of active ageing. To clarify how these values potentially influence the lives of the older adults in the EU we analysed statistical background material for policy recommendations. Our analysis of the language in selected central EU statistical documents from 2012 on active ageing shows that the implicitly valued ideal is that the typical older adults should contribute to society by staying in the labour market longer, participating in civil society, being informal caregivers to relatives, and staying healthy from a biomedical perspective. Based on a Foucauldian

analytical methodology we find a tension: The language used, and the implicit norms convey an understanding of the older adult as a means by which the state obtains its overarching fiscal goals. The risk of this verbalisation is that it turns the notion of the older member of society into an actor who must internalise the state's specific goals to become a 'good' older adult and to live the 'good' old life. Recognising this tension invites a broader rethinking of ageing policies that value diverse forms of being, beyond productivity and health optimization. The analysis and discussion of a comparable statistical EU document from 2019 on the ageing Europe shows that the normative language somewhat moves away from a perspective of the group of older adults as an economic challenge for society as a whole. However, we still observe a leading rationale driven by an overarching economic discourse, framing the good older member of society in terms of activity understood via whether they are to be understood as productive in the eyes of society.

Ethics and consent

Ethical approval and consent were not required.

Data availability

All data underlying this article consist of publicly available European Union documents. No new datasets were generated or analysed beyond these existing public materials. The documents analysed in the study can be accessed openly through the official EU publications portals and related institutional websites. Because all data are already publicly accessible, no additional dataset is required or deposited.

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Eralba Cela
University of Milan, Milan, Lombardy, Italy

This manuscript addresses a relevant topic in the field of ageing and social policy, namely the normative implications of the active ageing discourse in European policy contexts. The paper is well structured, clearly written, and grounded in an analytical framework based on a Foucauldian approach to problematization, which offers a coherent and potentially insightful analytical lens. The identification of three key dimensions - societal obligations, expectations of health, and economic rationales - provides a clear and effective structure for the analysis.
At the same time the manuscript would benefit from several revisions that would strengthen its overall contribution.
While it acknowledges some relevant contributions, its engagement with the broader critical literature on active ageing could be further strengthened. In particular, a large body of research has already examined how active ageing frameworks are shaped by economic rationales and policy priorities, often highlighting the tension between normative expectations and individuals' actual capacities to meet them. The authors appropriately note that dominant discourses risk overlooking the diversity of later life. This is an important point that could be further developed.
Relatedly, the manuscript would benefit from a more explicit articulation of its specific added value. While the analysis is clear and well organised, the novelty of the contribution is not fully evident in the manuscript.
In particular, it would be helpful to clarify what the Foucauldian problematization approach allows the authors to reveal that goes beyond established critiques of active ageing. Making this point more explicit would significantly strengthen the paper.
The study design is appropriate, and the methodological approach is generally well explained at a conceptual level. The use of EU policy documents as empirical material is justified. However, the analytical procedure could be described in greater detail, particularly with regard to the steps followed in the analysis and the criteria guiding document selection. Moreover, the rationale for comparing the two documents from 2012 with a document from 2019 should be clarified. What is the basis for this choice? A clearer explanation of the document selection criteria would strengthen the methodological transparency of the study.
Moreover, several of the findings, such as the emphasis on productivity, independence, and economic contribution, echo well-established critiques. What is the added value of these findings?

With a clearer articulation of its original contribution and a stronger positioning within the existing literature, the paper has the potential to make a valuable addition to current debates on ageing and policy discourse.

Is the work clearly and accurately presented and does it engage with the current literature?
Partly

Is the study design appropriate and is the work technically sound?
Yes

Are sufficient details of methods and analysis provided to allow replication by others?
Partly

Are all the source data and materials underlying the results available?
No source data required

If applicable, is the statistical analysis and its interpretation appropriate?
Not applicable

Are the conclusions drawn adequately supported by the results?
Yes

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Migration and ageing

I confirm that I have read this submission and believe that I have an appropriate level of expertise to confirm that it is of an acceptable scientific standard, however I have significant reservations, as outlined above.

Reviewer Report 17 March 2026

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Philip Taylor
University of Warwick, Coventry, England, UK

A substantial critical literature already interrogates the concept of active ageing and closely related frameworks such as successful and productive ageing. The manuscript would be strengthened by engaging with this body of work and clarifying how the present analysis advances beyond it. At present, this literature is largely absent, which gives the impression that the article is rehearsing arguments that have already been widely debated.

A number of scholars have highlighted how active ageing discourses draw on broader neoliberal and entrepreneurial ideologies, emphasising notions of personal choice, lifestyle, individual responsibility and agency (Katz & Calasanti, 2015; Moulaert & Biggs, 2013). Foster and Walker (2019), for example, acknowledge that policy frameworks associated with active ageing have increasingly been shaped by narrow economic or productivist interpretations. Moulaert and Biggs (2013) similarly describe the emergence of a work-centred "productivist version of legitimate ageing". Related critiques argue that contemporary active ageing policies rely on problematic social constructions of older workers that frame continued labour market participation as both desirable and morally necessary (Taylor & Earl, 2016). Such framings tend to reduce later life either to a "productive" narrative (older workers as economically valuable) or a "vulnerable" narrative (older workers as disadvantaged), thereby overlooking the diversity of later-life experiences and reinforcing ageist assumptions.

These debates are important because they highlight a key limitation of policy discourses that place work at the centre of what it means to age well. As Katz and Calasanti (2013) note, inequalities accumulated across the life course become increasingly salient in later life. Individuals with employment histories characterised by insecure or low-paid work often have fewer financial resources, weaker pension entitlements and poorer health, all of which constrain their capacity to extend working lives. While advocates of prolonged working lives frequently point to potential benefits—such as social engagement, intellectual stimulation and physical activity (Roodin & Mendelson, 2013)—critics argue that such perspectives often assume that all work is beneficial. This overlooks the significance of job quality, employment security and labour market inequality in shaping older workers' opportunities and preferences (Taylor & Earl, 2016; Phillipson, 2019). Moreover, evidence suggests that many older people do not necessarily embrace the work-centred model of later life implied by active ageing discourse (Earl & Taylor, 2017).

A further issue concerns the conceptual ambiguity surrounding the term itself. Although active ageing was originally framed as a holistic life-course approach extending beyond labour market participation, in practice policy narratives—particularly those promoted by major international organisations such as the World Health Organization, the United Nations and the European Union—have increasingly emphasised its economic and productivist dimensions (Foster & Walker, 2015). At the same time, there remains little consensus regarding what the concept actually entails (Moulaert and Paris 2013). This lack of definitional clarity has led some scholars to argue that active ageing risks functioning as little more than "positive political rhetoric" (Foster & Walker, 2013) or even "empty rhetoric" (Boudiny, 2013). Others have called for the concept to be reconsidered altogether, pointing to its limited engagement with gendered life-course inequalities and its often-implicit androcentric focus on economic productivity (Foster & Walker, 2013), or proposing broader alternatives such as "ageing well" that incorporate cultural and social dimensions of later life (Ranzijn, 2010). Given the extent of this existing critique, the manuscript would benefit from situating its argument within this literature and clarifying how it contributes new theoretical or empirical insights. Without such engagement, the paper risks appearing conceptually underdeveloped and insufficiently connected to the established debates surrounding active ageing.

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Is the work clearly and accurately presented and does it engage with the current literature?
No

Is the study design appropriate and is the work technically sound?
Yes

Are sufficient details of methods and analysis provided to allow replication by others?
Yes

Are all the source data and materials underlying the results available?
No source data required

If applicable, is the statistical analysis and its interpretation appropriate?
Not applicable

Are the conclusions drawn adequately supported by the results?
Yes

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Ageing workforce, older workers, active ageing

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for reasons outlined above.