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The relevance of a sociocultural perspective for understanding learning and development in older age

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\textbf{ABSTRACT}

This paper proposes a sociocultural psychology approach to ageing in the lifecourse. It proposes to consider sociogenetic, microgenetic and ontogenetic transformations when studying older age. On this basis, it considers that older people’s lives have two specificities: a longer life experience, and a unique view of historical transformation. The paper calls for a closer understanding of the specific and evolving conditions of ageing, and for more inclusion of older citizens in public debate and policy making.

Ageing of the population is a major challenge from most countries in Europe, the USA and some Asian countries. The issue of age has mainly been addressed in terms of health, cognitive decline, socioeconomic and housing challenges, and more recently, in terms of exclusion and marginalization. However, for complex historical and cultural reasons, ageing is rarely understood in terms of learning and development. Interestingly, psychological research has long reflected common sense representations of age: childhood is meant to be a period of play, then learning; adulthood is characterized by working; and older age is defined by retirement. These representations also express or guide institutional arrangements: states invest in schools, professional support, and retirement homes. But what if we questioned these long-held assumptions: what if adulthood was also about playing, and more importantly, if old age was also about learning? In this paper, we start with the assumption that considering people over 65 in our societies as simply “retired” and “ageing” is a social, theoretical and, most importantly, ethical impasse. We believe that, in a context where medical progress and social conditions allows for people aged 60 to 65 (average formal retirement age) to live 15 to 20 years more (according to Eurostat), it is of foremost importance to redefine what is at stake during these years. People cannot be simply considered to be “ageing” for a quarter of their lives – imagine, in symmetry, if the whole literature on childhood and youth would simply be summarized by “growing up”? In this paper, we pose the first basis of a reconceptualization of “old age” in terms of learning and development. As part of a research group called AGILE – Ages for learning and growth: Sociocultural perspectives – we therefore have attempted to define a new theoretical frame, which allows accounting for learning and development in people growing older. In order to do so, we sketch a new theoretical frame to approach the development of the person with older age. We propose to apprehend ageing as part of three mutually dependent streams of processes: the sociocultural transformations that guide ageing; the course of life of the ageing person; and the day-to-day situations in which more or less old people meet and interact, in specific material and social settings. Doing so, we not only show the continuity of learning and development in people with older age, but we also try to highlight the specific modes of learning and experiencing that only being aged may bring about. We hope that our approach to ageing can allow us to transform and develop our practices and institutions, so as to establish more adequate relations to people who are characterized by being temporarily older than us – while we

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2. Theoretical framework

Sociocultural psychology is a theoretical approach to human experience and development that considers the mutual constitution of the person and their social and cultural world, as these dynamics are located in time and space; it also gives a central role to human experience and sense-making (Cole, 1996; Rosa & Valsiner, 2018; Valsiner, 2012; Wertsch, 1998). Inspired by American pragmatism (Dewey, 1938; James, 2007; Peirce, 1974) and Russian psychology (Vygotsky, 1986, 1997), it is now a flourishing field. Some of its current sub-orientations such as narrative cultural psychology (Bruner, 2003; Dauite, 2014), historico-cultural psychology (Hedegaard et al., 2008), and semiotic cultural psychology (Valsiner, 2014; Wagoner et al., 2014) meet in their dialogical epistemologies, and their interest for formal and informal learning as well as for human development (César & Kumpulainen, 2009; Mäkitalo et al., 2017; Zittoun et al., 2013).

In these conditions, it is surprising that sociocultural psychology has very little addressed psychology of ageing—it is hardly surprising for Vygotsky, one of the main inspirations in the field who died aged 34 (Zavershneva & van der Veer, 2018), but more so for more recent studies. Indeed, such silence reproduces a tendency visible in mainstream psychology, that is, a strong divide between psychology of the life-course—ending somewhere in mid-adulthood—and gerontology, considering older age mainly as it is accompanied by illnesses and other ailments (Jeppson Grassman & Whitaker, 2013). There are however a couple of recent sociocultural studies of the older person, such as that of Manuti et al. (2016), who propose a dialogical perspective that “implies the acknowledgement of elderly subjectivity inside social discourses and, as a consequence, the need for catching what they can say” (Manuti et al., 2016, p. 4), of authors focusing on the materiality of people’s lives and can therefore adopt a mediated activity approach (e.g., Engstrom & Sannino, 2016; Woll & Bratteteig, 2018) which examines care (Boll et al., 2018).

Why has sociocultural psychology not studied ageing more? It may be that it has been privileging an analysis of the cultural conditions of growth which appeared more clearly in childhood; or perhaps it is due to the fact that, as a discipline, it has to be accountable for its existence, and thus studying learning and work in youth and adults can have more direct implications for practice. More generally, sociocultural psychology may also simply reflect a global tendency, both sociocultural and theoretical—an avoidance of thinking ageing and death: beyond a classic interest for ageing in Ancient Greece, modern psychology has long avoided the topic. Indeed, the preoccupation of the “fathers of psychology”, such as Piaget or Watson, did not find ageing relevant for their enquiry (Birren & Schroots, 2001); in addition, studying ageing raises specific methodological challenges (Säljö, this issue). Here we aim at developing a more systematic and thorough definition of a sociocultural perspective on age. For this, we propose to approach developing ageing persons through an understanding of sociogenetic, microgenetic, and ontogenetic dynamics (Duveen, 2013; Gillespie & Cornish, 2010; Zittoun, 2016).

2.1. A Sociogenetic view on ageing

Ageing cannot be approached today without an understanding of societies and their historical changes—beyond the obvious fact that older people have a very different status in communities where age is associated with wisdom than in industrialized societies. This includes three aspects that have been documented in ageing studies and critical gerontology, and that are linked to practices of social inclusion and boundary work, practical arrangements and affordances, and social representations.

First, one has to examine how various groups (nation states, region, and communities), as social collectives, explicitly or implicitly include, marginalize, or exclude their oldest members (de Beauvoir, 1970). Such dynamics of exclusion for instance take place when...
older people are ignored in public debates about the role of older citizens or the future of society, or by a subtle logic of suspicion (e.g., in many countries people after a certain age have to test their driving capacities every year, independently of their actual state of health). Moreover, “age” as social category has to be understood in articulation with other categories: ageing poor or rich, ageing migrant, or ageing hetero- or homosexual might create specific dynamics of social inclusion and exclusion, recently addressed in terms of cross-sectionality (Machat-From, 2017; Rosenberg et al., 2018).

Second, societies and their historical transformations have to be understood in terms of their institutions, and in industrialized societies, the policies that create the financial, symbolic and material conditions of living of the older citizens, and their related various affordances. Institutions define who is “retired” and when, what guarantees and rights people have after they have finished a working life (or, for non-working people, when they reach the same age). It is thus important to note that the consensus considering the “third age” starting at around 65 is aligned on the age of the pension (Stuart-Hamilton, 2011). Institutions also define modes of housing for older citizens, urban arrangements and transports, allocations for home care, cultural offers such as Universities of Third Age, or cheaper museum entrance, etc. Developing as older person is thus radically different if one has a pension that covers 70% of the person’s former salary and enables them to maintain their lifestyle, or if the pension falls below the 50% and demands the person to radically limit their expenses; if one lives in a town with low-buses or with no public transports, etc. (Abramson, 2015; Aneshensel et al., 2016; Bengston, 2016; Quesnel-Vallée et al., 2016). However, it is important to note that older people still may define their lives, and create margins of freedom beyond the local institutional possibilities and constraints, as we will see.

Third, societies produce and are shaped by social representations and discourses on ageing and what “older people” are, and what they are expected to do or not to do. Important attention has been paid to “ageism” as the negative social representation of older age in societies that privilege youth and its appearance in terms of beauty, strength and performances (Angus & Reeve, 2006; Casas, 2014; Nelson, 2005). In turn, older people have been said to develop resistance to their “mask of age” and become alienated (Humberstone & Cutler-Riddick, 2015). Also, the emphasis on “successful”, “active” or “positive” ageing, both in psychology (since the 1960s) and in institutional and public discourses (Balard, 2015; Havighurst, 1961; Rowe & Cosco, 2016), mostly individualizing “success” and ignoring sociocultural and economic conditions facilitating or impeding such modes of lives (Bülow & Söderqvist, 2014), has brought some people to experience their own less-active older age as failure, even though it may be meaningful to them (Stenner et al., 2011). However, with the development of critical perspectives on these categories, and also probably with the growing population of older active people, there is currently an increasing transformation of social representations of becoming older. This change can for instance be observed in a growing number of films depicting the realities of living with age (Haneke, 2012; Sorrentino, 2015), an increased market of products targeting ageing persons (whether cosmetics, insurance, travel packages, clothing, etc.) or with fashion movement valorising the beauties of older people (Campone, 2018).

Hence, at a sociogenetic level, we call for a careful analysis of the historical evolution and local specificities of the dominant discourses on ageing persons, the institutional arrangements setting conditions for older people’s lives, and the differentiated dynamics of social inclusion and exclusion of elderly persons. Research needs to examine how older people meet these discourses, arrangements and dynamics in their everyday lives, and how they can negotiate, resist or accept them, for instance as empowering and supportive social scaffolding for pursuing meaningful ageing. In this rapidly changing field, older people play an active role themselves, for instance through specific forms of political involvement (recently, the Swiss “Grand-Parents for the Climate”, or the Danish “Grand-Parents for Asylum” (Hviid, 2020)).

2.2. An ontogenetic view on ageing

A sociocultural psychological perspective also demands an understanding of the person in her context and along her life-course. In other words, it requires understanding the person in time, in a dynamic moment of their life: how the present is related to the past and how it is oriented toward the future. To move out of a negative representation of ageing as decline, a first step would be to abandon classic models of development that consider the lifecourse as a staircase or as a curve where ageing is designated by a declining slope (e.g., Sato et al., 2007; Sato et al., 2013; Zittoun et al., 2013). Drawing on recent theorisation, we propose to consider the course of life as constantly changing, and to conceptualize it as dynamic assemblage of spheres of experience (Zittoun & Gillespie, 2015). Drawing on phenomenology on the one hand, and on more psychosocial descriptions of the frames of living on the other, the notion of “sphere of experience” describes an experiential unit that a person can recognize as “the same” over time, place, and relationships, and usually includes specific activities, modes of relating to others, range of feelings, aspects of one’s identity or positioning, and certain specific knowledge or know-how. Spheres of experience can, for instance, include eating-with-good-friends, or gardening, or remembering one’s childhood, or participate in a scientific inquiry as citizen scientist. Each occurrence of “eating-with-good-friends” may be located in different places and include different foods and conversations; yet it may be the overall “same” range of experience. These spheres may be “proximal” (they take in the here-and-now of specific material and social affordances) or “distal”, when they are achieved through a loop of imagining, such as “remembering one’s childhood”. Over the day, people pass from one sphere to another through a “mild shock” (Schutz, 1944). However, new experiences may demand a radical reconfiguration of some spheres of experiences (such as an illness that prevents some type of food) or their destruction, as when a good friend dies and all the possibilities of joined experience disappear. New spheres of experience can also be created, such as when one moves to a new place—liminal experiences that we have coined as transitions (Zittoun & Gillespie, 2015; Zittoun et al., this issue).

1 https://www.gpcclimat.ch/qui-sommes-nous/
In line with the main assumptions of life course research, we assume of course the historical and social embeddedness of peoples’ course of life, the fact that people’s lives are interrelated, and that the results and timing of past event may constitute, enable or constrain current and future developments (Elder, 1994; Janet Zollinger Giele & Elder, 1998). However, we are also very sensitive to people’s capacities to “rewrite” their course of life, to find or create alternative developmental trajectories, and to live not only from what has been actually achieved or failed, but also, from what has been dreamed or anticipated, or from what has not come to be actualized but is still relevant (Zittoun & Gillespie, 2016; Zittoun & Valinsuer, 2016). It is also worth noticing that we conceptualize the persons’ capacities not only as individual characteristics, but as capacities emerging from the relationship between individual capacities and sociocultural conditions, policies, institutions, discourses, and tools that enhance or limit, empower or disempower, support or prevent personal navigation and capacities during a lifecycle.

Altogether, the approach we propose brings us to highlight the fact that development occurs if, and only if, people can maintain a sense of continuity and integrity across their spheres of experience (Erikson, 1959), and confer meaningfulness to their lives and future perspectives. The idea of meaningfulness may be described in several ways, but here we put emphasis on two main components. On the one hand, it implies “sense-making” of one’s experience (Bruner, 2003; Freeman, 2011), or “engagement” in significant activities (Hviid, 2020; Hviid & Villadsen, 2015; Lido et al., 2016). It also entails a minimal orientation to the future, that has been called “creativity” of living (Gutton, 2016; Winnicott, 2001; Zittoun & de Saint-Laurent, 2015), or “desire for life” (Quinodoz, 2008; Villa, 2010), or “imagination” as way to go beyond the here-and-now and as existential tension to what has-to-come or could possibly occur (Zittoun & Gillespie, 2016). On the other hand, meaningfulness can be related to meaningful interpersonal relationships, social recognition, and more generally, social inclusion (Sarason, 2011b). In this sense, meaningfulness or orientation to the future engage one’s fundamental dialogicality (Marková, 2016) with self and society, past and future, real and imaginary others, that is, an intention of living.

2.3. A microgenetic view in ageing

A sociocultural psychology perspective on ageing proposes to explore the making of the person and the social as a meeting between sociogenetic and onontogenetic dynamics precisely in specific activities and interactions, that is, at the level of microgenesis. It thus proposes to identify and examine socially situated experiences and practices in the making, in all kind of real and imaginary situations that constitute everyday life. Microgenetic dynamics take place in a wide range of situations and relationships, and have been studied with various focuses: in older people’s daily interactions with neighbours, family members, or objects, or with objects mediating interpersonal interactions (Aarsand, 2007; Iannaccone, 2015); as part of promenades in the urban, countryside, or institutional environment (Badley-Rodriguez, 2003; Guglielmetti, 2015; Mallon, 2005; Meijering & Lager, 2014); as activities of learning, working, gardening, exercising (Humberstone & Cutler-Riddick, 2015; Stenner et al., 2012); or as encounters with representatives of institutions, such as doctors or care practitioners (Meijering & Lager, 2014; Mortenson et al., 2016; Sarason, 2011; Wapner et al., 1990).

Hence, most aspects of daily life, from walking on the beach to remembering one’s childhood, have been approached microgenetically (Butler, 1963; Gubrium & Holstein, 1999; Lieblich, 2014). Studies have recently proposed to consider these socio-material environments as part of the conditions or the arrangements enabling life, such as for instance in studies on the “landscape of care” (Milligan & Willes, 2010). More generally, the invitation is to pay a close attention to the actual social, material, technical, spatial environments or “ecologies” of older people’s lives, and to study the dynamic of their mutual co-constitution (Säljö, this issue). From the perspective proposed here, the socio-materiel environments are thus the settings in which people may support, or develop their spheres of experiences.

These microgenetic dynamics are, we believe, key-elements to document and understand the experience of becoming and being older; but we also claim that a sociocultural psychology of growing older can only be achieved by combining these dynamics with an understanding of the sociogenetic movement involved, and by preserving the unique perspective and experience of the person unfolding in time through ontogenesis.

3. The specificities of lives of older persons

Considering ageing as part of people’s lifecourses from a triple socio-, onto- and microgenetic perspectives has the advantage of being integrative, but is not specific to older people’s life. Our main theoretical innovation lies in the identification of the specificities of development in the life of older people, first in a rapidly changing environment, and second, as a result of life experiencing.

3.1. Rapidly changing sociocultural environments for ageing

The evolutions noted above create new life conditions for older people; as the generation of baby-boomers becomes older, we observe the making of new societal configurations. On the one hand, the societal and institutional conditions of living when growing older may differ across places. Life settings may radically vary, depending on local socioeconomic living conditions (Abramson, 2015), or at the scale of nation-states. A recent international comparison thus shows that location (i.e., specific region/state) is the best explanation for variations in factual conditions of living and in the self-evaluated quality of life in older people, all others variables being controlled (Stewart et al., 2018). Some national retirement systems make life difficult; others systems, which may appear better, have however for long privileged sending older people to retirement homes located at the periphery of cities or in the countryside, de facto marginalizing and excluding older citizens from the social arena.

On the other hand, however, these social and geographical inequalities are themselves in transformation. Institutional movements
start to develop measures to fight against this tendency, for instance by rearrangements of the urban space to facilitate the mobility of frailer people, by developing intergenerational housing options (for instance in many Swiss cities) or by creating new city spaces to support meaningful engagement of older citizens (e.g., “The Old People’s Playground Project” in London [Perry & Blason, 2016]). As these conditions are rapidly growing, we have to keep a special attention on these: first, the existing or newly designed conditions may not correspond to what people getting older use to expect for their older age when they were younger. For instance, in many Eastern European countries, people grew up in three-generation houses with a grand-parent, and may have expected the same for themselves when they would reach the same age. However, with the rapid urbanization and professional mobility, this expectation is often not met, adding thus to the solitude of older people the disappointment of betrayed expectations. In contrast, in urban centres, people who may have feared growing old alone may now find new shared housing for older citizens, benefiting from new and unexpected options. Second, the social categories of “older people” are also rapidly diversifying, some of them being the object of public discourses: there is currently a heightened sensitivity to gender inequalities, due to fact that former baby-boomers who may have had unconventional lifestyles now access older age; there is also an increased presence of an ageing migrant population.

These “new olds”, unequally social and geographically located, encounter national and institutional evolutions that were frequently designed without their active participation and that are currently evolving. Not only does society try to render meaningful the increase of older citizens, but older people have also a need to make sense of becoming older in this rapidly changing society, and to take part in reshaping it, with or without the younger generation. As the younger generations shape their own present and future living conditions, society would have everything to gain if they could do so in an inclusive, participative and dialogical way.

3.2. Unique life experiencing as people becoming older

Older people have the specificities of having a longer life experience and often of being released from engaging daily activities. This has some implications.

First, having lived longer lives, older people are more likely to have lived through more spheres of experiences, and more reconfiguration of spheres of experiences than younger people: many family or friend-related experiences, numerous professional situations, situations related to social life, events related to leisure activities, diverse cultural events. They may have witnessed the slow transformation of some of their spheres of experience and their relatedness with social changes, for instance through technological, economic, political, and cultural changes; they may have lived many ruptures, as some spheres disappeared, and others appeared. Going through these many experiences and changes, people may have learned from experience something valuable not only for them as individual persons, but for other related persons, and for the society in which they are engaged. For example, they may have developed more nuanced ways to address loss and newness, to handle the daily life and exceptional events, to deal with emotions and make sense of it. This may be called “learning from experience” (Bion, 1989), or also, the development of personal life philosophies (Valsiner, 2007; van der Veer & Valsiner, 1993, p. 16; Zittoun et al., 2013) (comparable intuitions have been addressed by the notion of “wisdom” in psychology [Baltes, 2004; Baltes & Kunzmann, 2004]). This may thus become people’s life motives (Thomae, 1968), “practical wisdom” and engagements (Hviid, 2020), or “melodies of living” (Zittoun et al., 2013).

Second, as people lived their lives, they may precisely have had the opportunity to experience many and diverse social changes and transformations as well: they lived through wars, economic crises, massive population movements, radical innovations, or political transformations. Experiencing first-hand sociogenetic dynamics as they were themselves developing may have brought them to identify historical or societal patterns of change, evolutions, or on the contrary, to radically change their views on the world. They may thus have developed “personal world philosophies” colouring their interpretation of social histories as well as their understanding and participation in social life (de Saint-Laurent, 2017).

Depending on these two aspects (the development of personal life, and world philosophies) people becoming older may diversely engage in, or maintain activities that are meaningful to them and society. If we try to develop more general understandings of ageing, we thus need to consider the tensions between the developing persons and their evolving environment (and not only the person’s functions or psyche), and to account for the diversity of dynamics taking place.

At one extreme, we may hypothesize that some older people have strong engagements within their spheres of experiences, to which they confer sense, and a clear orientation to the future; they also may have learned to read patterns in the social world. As a result, they may actively engage in, and create activities in which they find sense, inclusion and purpose, and feel that they can participate to societal changes. This is for instance the case of older people engaging in political action (Caissee, 2011), as also exemplified in the case-study reported by Pernille Hviid (2020).

At another extreme, older people may have developed negative representations of institutions and the social world, which, they feel, have closed down their opportunities to participate; excluded from social life, with spheres of experience that may be less satisfying, the may have very little occasions to produce meaningful activities and therefore to develop imaginations of their future. This is for instance the case of retiree in Serbia for which socioeconomic conditions are de facto marginalizing.

Finally, somewhere in between, people may be more or less satisfied with their social world, while having a set of good-enough engagements; thus, they may maintain a sense of orientation toward the future and create new sphere of experience even in relatively constraining situations. Such position is exemplified by the cases of people living in the retirement home who may find spaces of imagining and creating in the relatively limited zone of free movement left to them (Zittoun et al., this issue).

Identifying how older people’s development emerges out of specific sociocultural environment may thus invite us to reflect on the condition that may facilitate life engagements and meaningfulness.
4. Implications for theory, practice and policy making

Our societies are largely changing in terms of structure of the population and economical balances, at a period where ecological and political challenges are everyday more present. The reality of the ageing of the population is undeniable, and societies expect a rapid increase of the proportion of older people in good health, ready to engage in meaningful living, even though they are excluded (or liberated) from active professional life. Older age thus constitutes the future of most of us.

It is therefore not only a theoretical imperative, but an ethical one as well, to include older persons in our society. We need to empower them and secure their involvement and voice in (re)shaping institutions and policies that have significant implications for their quality of life, as well as for the future courses of lives of others. This imperative is based on two key arguments. On the one hand, older people have the right to keep developing and live meaningful lives. On the other hand, and more specifically, they are also de facto the ones with the longest life experience, and are likely to remember the past, to have learned from the changing world, and from their own course of life. They may have much to contribute to our current and future situations, and it may be essential for our societies to rely on their experiences and philosophies as well.

As a consequence, as social scientists and educational researchers, as well as citizens, it is necessary to create conditions of participation, in which people can pursue meaningful lives, manifest, use and share their life experience, and become producers of the institutional conditions of their living.

4.1. Coda

While we have been finalizing this paper, the COVID-19 pandemic has transformed the everyday life of almost all people in the World, both in terms of their activities and their social relationships. It is especially true for the persons of older age since they have been recognized as sensitive group of citizens in many countries. Consequently, they have been the object of various sets of policies and practices related to the COVID-19 pandemic. In order to protect them, sanitary measures have resulted in social isolation, and interdiction to engage in the daily activities and social relationships through which their main engagements take place. Most older people had to question their projects and modes of lives; some were dramatically touched in their physical and mental health. In addition, in many countries, intergenerational resentment has been observed. One way or another, the great majority of older people have mostly been excluded from the debate and discussions related to their place and status during the crises – only the boldest have intervened in the media.

At this point in time (August 2020), it is hard to predict how the COVID-19 pandemic will transform ageing in many societies. However, this dramatic situation provides a strong case for the main thesis of our paper, illustrating how the three processes of social transformation, everyday interaction and the courses of life are intertwined, creating a knot of unique experiences demanding new forms of learning and development for many elderly persons around the world.

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