THE RETIREMENT AND THE SOCIAL BOND: REFLECTIONS ON TRANSITION’S CONVERGENCES AND DIVERGENCES

A REFORMA E O LAÇO SOCIAL: REFLEXÕES A PROPÓSITO DOS ENCONTROS E DESENCONTROS DA TRANSIÇÃO

JUBILACIÓN Y VÍNCULO SOCIAL: REFLEXIONES SOBRE LAS CONVERGENCIAS Y DIVERGENCIAS DE LA TRANSICIÓN

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ABSTRACT: The formal exit from the labor market, through the Retirement, is a moment that causes significant changes in the rhythms of daily life and organization. This conclusion justifies a reflection on its impact on people’s lives and on the prejudices and stereotypes that end up being associated with them. This study aimed to understand how the transition to retirement affected the lives of the people who participated in the study, in the light of the theory of “Social bond” proposed by Serge Paugam (2008). The analysis is on the experience of the retirement considering the two dimensions of Social Bond, proposed by the author — the protection and recognition — as well as the implications that the retirement had for these people in the four types of Social Bond. This work held up an interpretative paradigm of reality, having performed six semi-structured interviews with retired people, which were then subjected to a detailed content analysis. It was concluded that while the bond of organic participation is weakened with the entry in the retirement, the other three types of social bond turned out to be strengthened with this transition, and in particular affiliation bond, the bond of elective participation and citizenship bond, even with diversified expressions. This text still shows up discussions about the retirement and prejudices and stereotypes associated with old age and aging as current concerns for Social Pedagogy.

KEY WORDS: gerontology aging (individuals) retirement age discrimination

PALAVRAS-CHAVE: gerontologia envelhecimento reforma discriminação etária

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1. Retirement as a challenging transition

Being part of the “meaningful transitions” (Moen & Wethington, 1999) that marks the life cycle of individuals, a retirement takes challenges and changes that are important to understand both on a personal level and a structural level. In this sense, rethinking the role of the retired people in current societies is an emerging need, in a political/economic context that excludes, somehow in an evident way, the elderly people from paid productive activities. Guillemard (2007) draws attention to the centrality that working time has in the people’s life and in their self-perception sense of social utility, coming to be therefore fundamental to reflect and cooperate aiming a new perception of old age, strengthened in a still unexplored potential of the growing group of retired people as agents and actors of change.

Regardless of the transversal increase in unemployment in all ages groups in Portugal through the recent years (from 6.3% of total unemployment in 2003 to 16.2% in 2013; however, this figure decreased to 13.9% in 2014), it is in the 55-64 years of age group that this value has been showing more significant increases: from 4.3% in 2003 to 16.2% in 2013; however, this figure decreased to 13.9% in 2014 (Pordata, 2015). These data stimulate the discussion about the progressive population increase on people over 60 years of age, which is not consistent with the progressive withdrawal of elderly people from the labor market and the progressive disinvestment related to these workers.

Other factors, namely such demographic factors, justify a rethinking of the way of elderly people are considered, especially with regard to their relationship with the labor market and the relationship that work has with them. The management of this dynamic reflects how different generations deal with each other in a multidimensional context, with social, economic and structural implications.

It should be highlighted that the question of social transfers between active and inactive workers is a reduction when we analyze the question of retirement and its impact on societies and people’s lives, even because it has to be considered that the retirement significantly interferes with the current way in which the entire intergenerational solidarity system is organized (Guillemard, 2007; Mendes & Albuquerque, 2014).

2. Construction of a devalued image of the retirement period

The Welfare State has played a very significant role in reinforcing the centrality of individuals work time over their course of life. If during the youth there should be social protection that guarantees to the people the possibility of studying, to prepare them to enter in the labor market, people
in the old age should have guaranteed the right of a protected rest, based on their course as workers. (Guillemard, 2007). This Welfare State organization ends up opening a space to a devaluation of downtime, which involves, in this context, training time and retirement time.

Esping-Andersen (1990), in his famous study of social policies, categorizes different models of the welfare state, seeking to understand the extent to which these policies contribute to greater autonomy of individuals to survive in relation to the market. The author brings up the concept of “decommodification” of the individual’s labor force, i.e., he analyzes the policies “having as reference the degree of autonomy and independence that these policies can guarantee to the individuals and (or) families to survive beyond the market relations” (Silva & Zimmerman, 2009, p. 345).

In this sense, we can consider that the measures that establish the retirement age and guarantee pensions for the retired individuals could be measures that allow a decommodification of the elderly, who cease to depend on labor market to survive. We can’t forget, however, that the values of retirement pensions earned are closely linked to the relations that each person had with the market during their life course, and in accordance with its contributory path, with an assumed and clear differentiation related to the value of retirement pensions within the one that is often presumed to be a homogeneous group - the retired. This question, allied to many others, also has a major impact on the way that individuals face this new phase of their lives.

3. Ageism

This distribution of the life cycle based on age criteria, explained by Guillemard (2007) and also by other authors, such as Milissa Petit (2009), highlights and reinforces a rigid life path, marked by stages that define the transition from one statute to another, with no possibility of regression, contributing to the emergence of prejudices and stereotypes regarding each of these stages.

These prejudices and stereotypes become very significant regarding to the self and hetero image that is being strengthened in relation to the elderly. Faced with situations of inactivity due to their retirement from work, especially by retirement, the elderly are often referred to situations of inactivity that reinforce representations of the uselessness of these individuals.

Conscious of the impacts of existing stereotypes and myths on elderly people, authors as Hoffman, Paris and Hall (1994) warn about the society’s tendency to discriminate, ignore or not take them seriously (Hoffman, Paris & Hall, 1994, p. 509). From this understanding comes the concept of “ageism”: stereotype, prejudice or discrimination based on age, in this case specifically with regard to the elderly (Fonseca, 2006, p. 27).

It should be borne in mind that these stereotypes and prejudices regarding elderly people are a very broad phenomenon, which has complex and diverse issues underlying it, and it is important to reinforce that they end up having different impacts according to the circumstances of each person’s life, and may reinforce the self-image of the incompetent and incapable in the elderly themselves.

4. The retirement

Faced with the challenges that have been mentioned, it is important to understand what we are talking about, when we refer to retirement.

In 1986, Erikson, Erikson and Kivnick argued that the way as the retirement has been perceived over time has been changed. If retirement was previously understood as the rest time of the elderly after a long period of work, it was understood that this was increasingly perceived as the time to enjoy a new phase of life, enjoying new experiences and discoveries (Erikson et al., 1986).

The life expectancy average increase and the fact that more and more people have better physical and mental conditions until retirement have been contributed significantly to this change in the perspective related to retirement. The increasing dissociation between the age at which people retire and the manifestations of senescence, as well as the new social dynamics, highlighting the growing possibilities of very diversified paths that open up possibilities of less and less uniform retirement income, have brought multiple challenges to reform understanding and, consequently, the role of “retired”.

Fonseca (2011) presents a synthesis of the main ideas associated with “retirement”, which presents as three possible definitions of the concept: “(i) absence of ‘full-time employment’; (ii) economic income from social security and / or other pensions; (iii) personal identification with the role of ‘retired’...” (Fonseca, 2011, p. 11).

Even if significant changes are occurring in the way the reform is perceived, the literature shows that this transition from worker to retiree has a set of changes implicit, that, in the majority of cases, will have a great impact on people’s lives, being considered “an authentic turning point in the life of each one” (Fonseca, 2011, p. 11), involving changes and challenges that imply an adaptation as diversified as the life paths might be.
The great challenge of retirement is the fact that it contributes to a professional deinsertion, as Erikson et al. (1986) argues, and as Fonseca et al. (2011) corroborates, noting that when retiring, “the person leaves the condition of ‘Active’ (socially quite determined, as we have seen) and needs to adapt to the condition of ‘reformed’” (p. 11).

As well as being a fundamental element in the structuring of individuals’ economic and family life, work is also an important context for establishing relationships with colleagues and friends with whom the person shares a large part of the its daily life. Erikson et al. (1986) states that work is a context in which the person is part of a collective enterprise, is part of something greater that goes beyond the individual himself also contributing to the definition of his social roles. Thus, leaving the world of work will necessarily imply a set of re adaptations, both in the management of daily life time and in the management of relationships - social, professional and even relatives.

In this sense, authors such as Kleiber and Amigo (2012) talk about the importance of preparing individuals for retirement, namely from what they call “education for free time” (Kleiber & Amigo, 2012, p. 139), since the retirement involves a very significant change in relation to the amount of free time that the person has to manage, could be important a kind of conscious and timely preparation to these changes.

5. Social Bond Theory

Seeking to understand the impacts of retirement on individuals’ lives through another approach we can reflect on the ruptures that this change entails in the context of individuals’ lives in relation to what Serge Paugam (2008) calls Social Bond. According to this author, the social bond always has two dimensions: protection, which is related to the resources that each person can mobilize towards the difficulties encountered throughout life, and recognition, which is closely related to the interaction with other people and stimulates the person, reinforcing the importance of their existence and allowing it to be valued by the other ones.

The work can effectively be an important context for strengthening the social bond in both dimensions, and retirement can emerge as a precipitator of the rupture of the individuals’ social bond. This situation will become particularly evident with regard to the organic participation bond that, according to Paugam (2008), becomes stronger among actors in working life and has underlying learning and performance of a function or task in the work context. The fact that the individual has job stability and guarantees of social protection ensures the extent of the social bond protection, which may not be so affected by the retirement, since the person will, in principle, continue to have his social protection rights and access to services – public and / or private – according to their professional course. On the other hand, regarding the dimension of recognition, which is associated with the sense of social usefulness and esteem, it can no longer be said the same, being this one of the most significant disruption that the retirement represents in the life of the individual. As already mentioned, retirement is often associated with uselessness, therefore there is a social devaluation of retiree status and its role in society. It is in this segment that it is imperative to think about the impact that this rupture has on the individuals’ lives and societies, thinking in parallel if there may be ways to contradict it.

However, it should be taken into account that the Social Bond is not restricted to organic participation, hence it will make sense to pursue the experience of the retirement considering the other types of Social Bond, assuming that this may be one of the most privileged steps for the strengthening the three other types of social bonds presented by the author.

Regarding to the affiliation bond, which the author associates to the relationship with the family, highlighting parents / children, their reinforcement can be verified especially in relation to grandchildren, great-grandchildren or other younger elements of the family, thus generating an affective investment between generations. Factors such as greater autonomy to move around, as well as the ability to use and betake the new information technologies can be a resource that enhances this greater proximity between generations.

The retirement can also be the time of reinforcement of the elective participation bond, essentially associated with the relations of friendship that the person establishes beyond the family, either with people with whom they already had this type of bond, or even by establishing relations of friendship with new people they may meet at this stage (Paugam, 2008).

Finally, this growing awareness of the role that the elderly can claim as agents of change of political and social participation may be the major expression of the strengthening of citizenship bond (Paugam, 2008).

6. Methodology

This paper was based on the analysis of the content of interviews carried out with retired people in a Master’s thesis on “Retired Volunteers: Volunteer Practices in Retirement”, developed under the Master in Social Gerontology (Martins, 2012).
It was decided to base this study on a qualitative methodology (Bogdan & Biklen, 1994), since it was mainly intended to listen, to understand and to problematize about what retired people who currently practice volunteering in Porto think on this activity itself, the reasons for why they started this activity and why they keep doing it, and the impacts that this can have for themselves and the people with whom they develop it.

The operationalization of this attempt materialized through the intensive method or case study, namely of retired volunteers, assuming the intention of not making generalizations from this investigation. According to Coutinho and Chaves (2002), the case study is a research plan that involves the intensive and detailed study of a well-defined entity: the “case” (Coutinho and Chaves, 2002, 223), the purpose of this empirical study.

Selection of participants

In an initial phase of the study were contacted three institutions of the city of Porto (Portugal) that receive volunteers — “Cáritas Diocesano do Porto”, “Associação Coração Amarelo — Delegação do Porto” and “Associação de Voluntariado do Hospital de S. João”.

The contact with these institutions was based on several factors and justifications, mainly being the fact that a significant part of the respective volunteers are retired people. Another important element in the choice of these institutions was the fact that there was found some easiness to contact them, which proved to be an added value for the study development.

From the contact with ‘key persons of the institutions’, they were asked to select, at their availability, volunteers from the institution (4 to 5 maximum) to collaborate in this study. The persons invited to participate in the study should cumulatively meet the following requirements:

- Being retired;
- Collaborating with the institution as a volunteer for more than 1 year.

From indications and contacts facilitated by the institutions, 6 semi-structured interviews were done with the retired volunteers from the city of Porto following institutions: Associação Coração Amarelo - Delegação do Porto, Cáritas Diocesano do Porto and Associação de Voluntariado do Hospital de S. João.

Collection and processing of data

Regarding the research techniques used to gather information, semi-structured interviews were conducted, since it was always intended to have a direct contact with the interviewees.

For the treatment of the collected data, content analysis was used in order to reach the information implied in the discourse of the interviewees, according to the perspective of Bardin (1979) and Minayo (2000). According to which content analysis can go beyond the merely descriptive scope of quantitative techniques to reach deeper interpretations based on inference (Cappelle et al., 2003, p. 5).

According to the aforementioned authors, the content analysis of the semi-structured interviews carried out within this study respected the three phases explained by the authors: pre-analysis; material exploitation and treatment of results obtained and presentation (Bardin, 1979 e Minayo, 2000, cit. Cappelle et al., 2003, p. 6).

In pre-analysis, the available material was organized, making a selection of the interviews that would be analyzed, from a first reading of the material. Having conducted fourteen semi-structured interviews (to all the people indicated by the institutions), the option was to make content analysis to six, considering the resource limitation and the time savings that underlie this task. The selection of the interviews to be analyzed in this study was based on two types of criteria. On the one hand, more objective or instrumental criteria were used, such as guaranteeing the representativeness of a man and a woman from each institution, the group diversity with regard to academic qualifications, as well as the professional activities performed by the volunteers before retirement, and the time variety over which they offer volunteering. At the same time, criteria related to the relevance and novelty of the contributions associated to the analysis indicators drawn up at this stage were also taken into account.

The material exploitation materialized in the codification of the data, which were organized into five major themes from which were defined seventeen categories of analysis and sixty-eight subcategories of analysis. From these data were analyzed, for this article, those related to the experience of the reform understood through the social bond theory.

Finally, the treatment of the results obtained and the interpretation of the results were carried out in the light of the theoretical framework and objectives that support all this work, having also, and according to what Bardin (1979) and Minayo (2000) predicts, emerged new theoretical dimensions suggested by the material reading (Cappelle et al., 2003, p. 6), as it is verified in relation to the retirement understanding through the Social Bond theory which is explored here.
7. Discussion of results

Retirement, seen as one of the significant transitions (Moen & Wethington, 1999) of the development process, is marked by the centrality socially attributed to the active and productive lifetime, leading to the preterition of professional life that characterizes retirement be materialized as one of the greatest challenges that people have to face during this new stage of their lives.

The understanding of meanings for retirement arises in the speeches of the people interviewed in this study, essentially marked by an understanding of what retirement means for themselves, as well as their possible roles as retirees.

Artur⁷ (68 years old) highlights throughout the interview this reflection on retirement and the best way to face it, which becomes obvious when he says: “I think retirement is to be experienced in some way! Without being stopped, but also without the pressure of time from work”.

Those who work 37 or 38 years, I still managed to do 47 years of work, when they reach the end of this time they cannot be subject to having to get up at 7am because at 8.30am there must be there and then leave at 4am... no, it must have a certain freedom, to arrange a scheme in which brings obligations to not be ostracized, to have some obligation, to do something, that is to move but also do not get stuck, otherwise the quality of life goes away.”

Artur emphasizes the importance of having goals for his daily life, of having commitments that impel him to act and keep active, but reinforcing highlighting the importance of finding a balance between the activities and commitments that one takes over and other dimensions that he considers as important, such as leisure and freedom to manage his time according his preferences, reminding us, throughout his speech, about the importance of people preparing themselves to their retirement, as he recommends to his friends: “You begin to prepare, when you reach at this point, start looking for a hobby, no matter what, so later, when you stop working, you do not have such a sudden transition. I mean, sometimes, a passage that can really be a volunteer program, when possible, a job like this... A bricolage for example, start...”

Confirming clearly what the literature reinforces, it is verified that the professional path of the people interviewed marked in a very significant way their lives, as much by the intensity and effort demanded by the specificity of the work developed as by the emotional involvement that marked an entire career. José, 67 anos, who did all his active career in Banca says: “during my working life I have had always a very intensive occupation”.

João, de 78 anos, administrative officer chief of a large company, was responsible for a large administrative area in one of the largest companies in Porto. In the words of Beatriz, 81, who was a teacher and social worker in Angola and Mozambique, we perceive this emotional involvement when she says that “it was all beautiful and I would do it again... As a public servant I never was. I’ve never had hours or Sundays.”. The same can be found in the speech of Ana, 57, who was a teacher of the first cycle, when she says “I had to be a teacher at school, I often had to do the work of an auxiliary, I had to clean the school...” and Matilde, 58, cook, that, in relation to her work, says: “I loved it! I still miss it, but...”.

Having been so evident in the interviews, this strong involvement in working time has left open the curiosity about how people understand this issue of leaving the labor market. Returning to Paugam’s (2008) approach, it is understood that several people refer to the rupture of the organic participation bond, since they verbalize that the reform can effectively constitute for some people a significant moment of rupture, but evidencing a personal distance to this less positive impacts that they identify as being associated with retirement, which can be found in José’s words: “most people when they enter to retirement they gain great time availability and sometimes even with difficulty in knowing how to occupy the time.”. Ana also shows this awareness that being moved away from the work context can be a delicate moment in people’s lives, saying: “When, after many years of work, people stop for a long time, then they feel they are no longer capable.” In turn, Artur warns of the importance of people preparing their retirement, “Not to be that, that exit... You leave the world of work in which you get up in the morning, the night comes always busy, always busy and now, suddenly, you have nothing to do.”

In relation to this question, Ana clearly assumes the withdrawal from work as a moment of rupture in her life, stating that: “When I retired, I felt the lack... It felt the lack... It is very good to be reformed, but a person works about 30 years or so and then the stop, at least, with me, didn’t work. I’ve stopped for a while, a few months to rest and such but then...”.

This assessment leads us to question the impact that having entered for retirement may have had on the three other types of social bonds, keeping us under the Paugam approach.

In relation to the bond of affiliation, associated by the author to the reinforcement of family relations of different generations (Paugam, 2008), two people mentioned that the reform allowed
the reinforcement of this bond; in the case of Ana: “Then I also had a baby granddaughter, who was born around that time, and I stayed with her daily, so my time was really busy... (...) I also have to respond to my people needs because I also have elderly people, I have my mother and other family members, who also need me, and my children, my most direct family”; in the case of Beatriz, she refers: “In pre-retirement I had something that I call my ‘totoloto’, that was the grandson who was born. And after 4 months, 5, I went to Lisbon to get him because he was born very little and I went to pick him up and brought him.”

José mentions the reinforcement of the bond of affiliation, but in relation to others, when he says that “...some people enter retirement and have a very busy life, caring for older parents who still need a lot of assistance or with children still in conditions in which they also need a lot of assistance.”

Only Beatriz refers to strengthening of the bond of elective participation, referring to a post-retirement period where she spent a lot of time with friends, with whom she had daily schedules: “I calls me by phone: ‘let’s go to the downtown to spend the afternoon and snack, today I’ll pay’. On Thursday next I received a phone call from F.: ‘today let’s go downtown’ and so there I was. This was every week”.

With regard to the possibility of retirement allowing the strengthening of the bond of citizenship, it can be said that it is evident in the discourse of all the people interviewed, at different times and referred to in different ways, we can take here the observation made by João, when he reports: “I really wanted, allow me, to give myself to do that... And in such a way that I wanted to give so much and today I live this [very devoted to volunteering],” or “There are many ways to be useful, but it seemed to me one way to take into account and, therefore, it was for that.”, as well as Ana, who says that: “the stop doesn’t help and sometimes do some volunteer work, something soft, will help the retired people themselves, ‘cos it helps them to avoid growing old or depressed and will help others in need. In the background there is a mutual help.”

José also refers to the possibility of reinforcing the bond of citizenship, when he observes that “with the retirement, the person starts to have more free time and begins to equate ‘How will I occupy this time?’ And there arises the vocation to be useful!”, adding that “it’s a good pedagogy to inform them [to the retired] about the social vocation of a post-retirement behavior.”

8. Conclusion

In light of the reflections presented in this paper, we can conclude that it is necessary to provide greater flexibility for social structures of support, even because the abandonment of professional life can take place in very different ages and modalities from person to person and the transition from work to retirement is much more fluid today than before, articulating with forms of abandonment of the professional life carried by temporal and social ambiguity such as ‘flexible hours of work’, ‘pre-retirement’, ‘long-term unemployment’ etc. (Fonseca, 2011, p. 19).

Debates about Retirement, about how this transition is experienced, how people prepare themselves (or do not prepare) for this change, as well as the prejudices and stereotypes associated with this moment of transition, old age and aging are current concerns for Social Pedagogy and, still, there is much more to explore in this area. The issue of retirement is much broader than what is exposed in this article, with a significant number of people who, for various reasons, end up leaving the labor market definitively at an early stage and / or against their will, and it can be expected that situations such as compulsory or anticipated reforms may have a distinct impact on the various dimensions of the social bond, and this is an area in relation to which it would be worth investigating.

In this sense, and taking Guillemard’s (2007) perspective, the emphasis of social policies should not be situated exclusively on risk compensation, but should also be concerned with the effective participation of people both in professional and other contexts. The author points out that social protection must underlie the principle of social investment, explored by Esping-Andersen, which presupposes the establishment of means to enable the development of people’s capacities and their access to education and training throughout their lives.

The appreciation of other dimensions of people’s lives will be inevitable if one defends a paradigm shift from what may be the place of older people in Western societies. The discussion can no longer be based on the activity / inactivity dichotomy, since it has become increasingly evident that this question cannot be read only by the lens of formal and paid work.

The problematization of this question, beyond its essentially economic dimension, can be one of the strong arguments in the call for a new solidarity amongst the generations that attribute a greater emphasis on the role of older people in the most diverse fields of social life.
If this most optimistic and possible vision of the experience of old age is still not real for all people and will still be far from being, it is believed that we gradually move towards the demand of continuation and reinforcement of a paradigm shift, based on the respect for the Human Rights of all people, including nominally the elderly.

References


Note

1. When requesting identification of volunteers for participation in the study, the organizations were asked only to identify retired persons, without specifying the context / framework of this transition between work and retirement.

2. All names are fictional.
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