

# Theories of Ageing: Lenses for Viewing, Signposts for Reforming Social Protection for Old Age



**Inequalities in Old Age: Old News or New Debate?  
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# Overview of the presentation



- Why are theories of ageing important?
- Applying theories of ageing to social protection policy for old age
- The field of theories of ageing
- Social theories of ageing
- Psychological theories of ageing
- Concluding remarks

# Why are theories of ageing important?



- 'Look at it this way'
- 'Everyday' versus 'formal' theorising
- All social policies (including social protection policies for old age) are based on theory at some level
- An understanding of theories of ageing is helpful to explain and make sense of social protection policies for old age

# Applying theories of ageing to social protection policies for old age



- 'Attempts to explain', i.e. lenses for explaining and critiquing social policy
- Signposts for (re)formulating social policy

# The field of theories of ageing



- Biological theories of ageing
- Psychological theories of ageing
- Social theories of ageing
- Interdisciplinary theories of ageing, e.g. biodemography

# Nine social theories of ageing



- The life course perspective
- Cumulative Advantage and Disadvantage / Cumulative Inequality
- Feminist theories of ageing
- Political economy of ageing perspective
- Moral economy of ageing perspective
- Theoretical reflections on time
- Sense of meaning
- Phenomenology of ageing
- Post-structuralist theories

# The life course perspective



Directs attention to the connection between individual lives and the historical and socio-economic context within which these lives unfold

- Principle of historical time and place
- Recession – major social event – has an impact across the entire population (older retired people, older workers, younger workers)
- Raises questions about shape pension system should take for future generations of older people

# Cumulative Advantage and Disadvantage theory / Cumulative Inequality



Advantages and disadvantages accumulate  
over the lifetime

Implications for policy:

- Tax incentives subsidise those who can afford private pension investment
- Less well-off not able to avail of tax reliefs/incentives
- Subsidisations thus contribute to cumulative disadvantage of less well-off



# Political economy of ageing perspective



Views the 'problem' of ageing in structural terms

In the current economy crisis:

- Private pensions exposed as fundamentally flawed
- An increased reliance on state pensions
- Underscores the need for a strong state pension system
- Focus on 'austerity' measures overshadows issue of income adequacy in old age
- State cannot afford pensions but is inequitably financing 'hidden' welfare

# Moral economy of ageing perspective



Directs attention to the collectively shared moral assumptions that legitimate certain social protection policies for old age

E.g. State pension age to increase in NI and ROI

- Presents political challenges
- Preferred over reducing state pension benefit
- But does it seek to maximise the welfare of the worst-off?
- Does it satisfy the concern for freedom for all?

# Theoretical reflections on time, age and ageing



Human ageing is too rich to be reduced to chronological age

- Social protection systems of older age in NI and ROI – chronological regimes
- Increasing the state pension age (SPA) – still chronological regimes
- Institutionalisation of retirement by SPA – an achievement but also an anachronism
- Relationship between SPA and when most people stop working is not straightforward
- Increasing SPA in time of recession: questions of employment opportunities for older workers and intergenerational conflict

# Sense of meaning



Human beings seek meaning in life and this is particularly significant in later life

- Like all of use, older people need to have a sense of meaning and purpose in life
- For *some* older people, participation in the paid labour market may give them a sense of worth or make them feel that they are 'givers'
- A cautionary note about emphasis on productivity

# Phenomenology of ageing



Focuses attention on the subjective experiences and the views of older people

- Back to the idea of 'everyday' theorising
- Older people's own views about being at the receiving end of social protection policies
- Older people's views about (re)formulating social protection systems in light of these experiences
- Older people as agents of change

# Psychological theories of ageing



- Lifespan Development theory
- Selective Optimisation with Compensation (SOC)  
(Cognitive plasticity)
- The Convoy Model of social relations

# Lifespan - Life Course



LIFESPAN	LIFECOURSE
<b>Micro</b> - endogenous	<b>Macro</b> - exogenous
The individual	Groups
Processes	Social pathways
Trajectories	Roles, role transitions
Infancy	Race, Class, Ethnicity
Adolescence	Organisations
Adulthood	Work, employment
Old Age	Family

# Lifespan developmental theory



- Plasticity: growth, recovery, learning of new skills
- Multidirectionality: growth and development as well as disability /decline; latter can give rise to former
- Increasing inter-individual variability that arises from biological and social factors



# Selective Optimisation with Compensation

Baltes & Baltes



Throughout their lives, individuals seek to successfully manage gains and losses through the strategies of selection, optimisation and compensation (SOC)

- (1) Selecting goals that provide a fit between needs and resources
- (2) Maintenance, enhancement & acquisition of skills and resources to prevent future loss or to enrich current resources; maximising abilities
- (3) Counteracting loss or reduction of capacities

# SOC illustrated by the case of A. Rubenstein



- (1) Practising and playing fewer pieces – easier to remember and play well
- (2) Practising more often
- (3) Deliberately slowing down before reaching a fast section of a musical piece

Why is there **STILL** so little scope for doing this in most jobs?

# Theory of cognitive plasticity



- Capacities are modifiable, or 'plastic', throughout the lifespan
- Focus on *intraindividual* plasticity at the brain & behavioural level, (the socio-cultural level)
- Cognitive training interventions

Why so little application of this?

Relatively little training available to older workers.

Yet working longer more realistic if scope for modifying work roles.

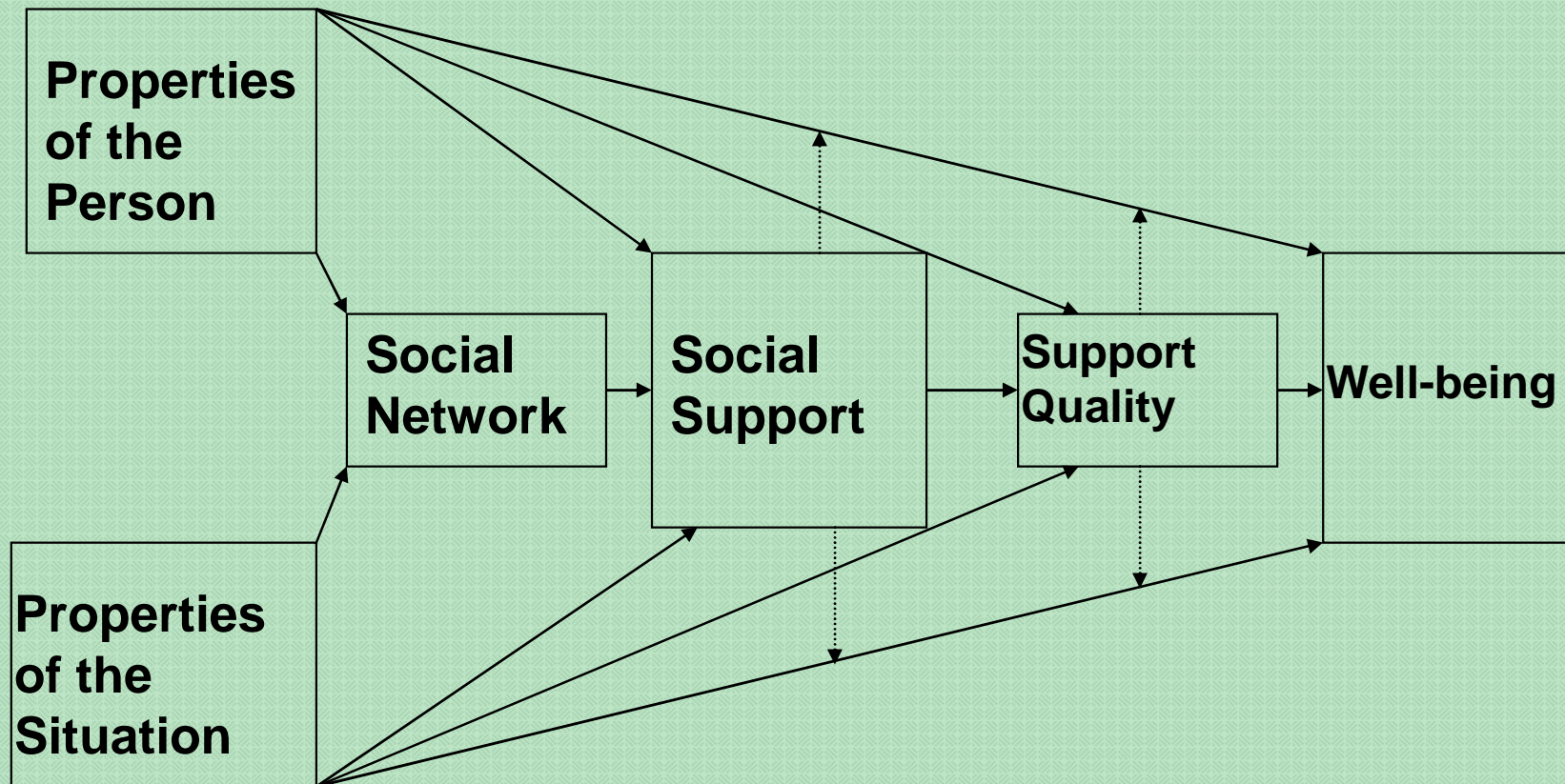
The role of occupational health.

# The Convoy model of social relations



People are shaped by their personal and situational characteristics ('convoys') which provide varying degrees of support and in turn influence health and well-being

# The Convoy Model - Antonucci

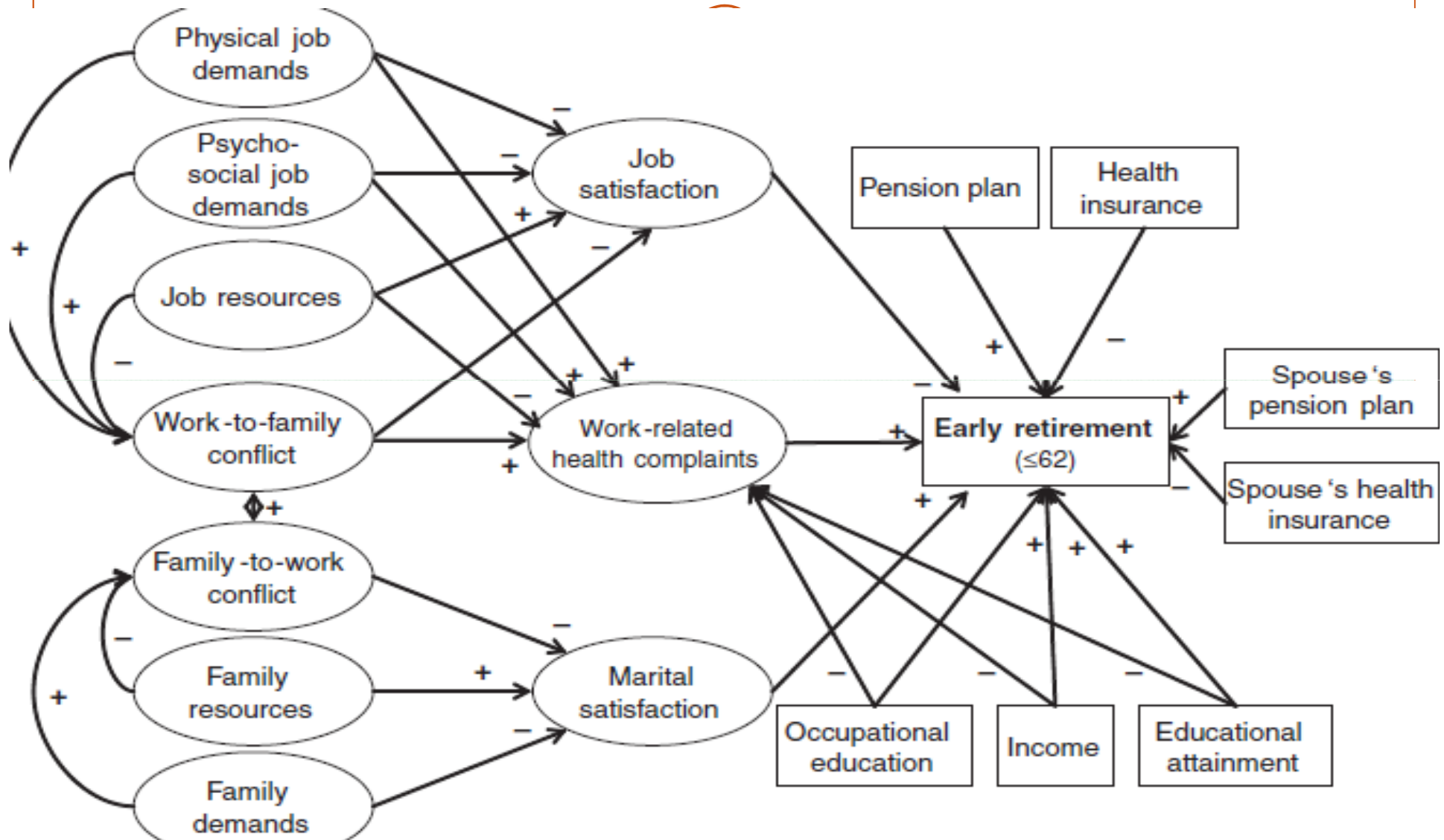


# Applying the Convoy Model



- Close (e.g. spouse) and role-guided (e.g. co-workers) relationships
- Role loss in later life → growing importance of family relationships in the network

# Early retirement decision (Kubicek et al. 2010)



# Concluding remarks



## Theories of ageing:

- Rich and diverse – and approachable
- **Lenses** for viewing social protection policies for older people
- Helpful as **signposts** for reforming social protection policies for old age

## Areas for further discussion:

- Availability, acceptability, awareness, accessibility to actors in policy formulation process?
- Strategies for bringing theories of ageing to bear on policymaking?
- The Life Course perspective being applied in Canada!