

ANDRAGOŠKA SPOZNAVANJA

Studies in Adult Education and Learning

Vsebina/Contents

Uvodnik/Editorial

<i>Sabina Jelenc Krašovec, António Fragoso, Marta Gregorčič</i>	OLD GUYS SAY YES TO COMMUNITY DEJAVNEJŠE VKLJUČEVANJE STAREJŠIH MOŠKIH V SKUPNOST	3
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Tematski članki/ Thematic Papers

<i>Marta Gregorčič</i>	BOTTOM-UP STRATEGIES FOR COMMUNITY ENGAGEMENT AND INFORMAL LEARNING: TARGETING MEN AGED 60 YEARS OR MORE	19
<i>Sandra T. Valadas, Carla Vilhena, António Fragoso</i>	TRANSITIONS TO RETIREMENT: PERCEPTIONS OF PORTUGUESE OLDER MEN	37
<i>Małgorzata Malec-Rawiński</i>	OLDER MEN'S BIOGRAPHICAL LEARNING AND MASCULINITY	53
<i>Tiina Tambaum, Felika Tuul, Reeli Sirotkina</i>	WHAT IS MISSING – OLDER MALE LEARNERS OR A COMMUNITY STRATEGY?	67
<i>Marta Gregorčič, Kaja Cizelj</i>	MEN'S GENDER CAPITAL EXPERIENCES IN LATER LIFE	81

**Knjižne novosti/
Book Reviews**

Dušana Findeisen

SIMONE DE BEAUVOIR: STAROST

103

Tadej Košmerl

ALAN WALKER (UR.):
THE FUTURE OF AGEING IN EUROPE:
MAKING AN ASSET OF LONGEVITY

107

EDITORIAL

OLD GUYS SAY YES TO COMMUNITY

This issue of *Studies in Adult Education and Learning* features five contributions that are the result of three years of research carried out by the partners of the *Old Guys Say Yes to Community* project.¹ In Slovenia, Estonia, Poland and Portugal, partners used similar starting points to study the low participation rates of older men in educational and learning programmes as well as in the community. Applying similar guidelines to research these phenomena, we carried out the following activities: first, we sought out the best practices in our countries relating to the informal learning of older adults in the community, focusing on older men. The main aim was to gain some insight into the real situation of men's learning in the community. Second, we carried out an in-depth investigation. Each partner interviewed a sample of 90–100 men aged 60 years or more in selected communities. In addition, focus-group debates were organised in these communities, which included local decision makers and members of civil society organisations. The project's organisational team prepared scripts for the semi-structured interviews and focus groups. Nevertheless, each partner had some freedom to adapt the research instruments according to local contexts if necessary.

An interim report was drawn up and based on the findings, the partners worked on their recommendations. These targeted national and local authorities as well as civil society organisations. We tried to gain as much constructive feedback as possible and include it in our work. We also analysed the differences that had appeared between our countries. Based on the reports, evaluations and analyses, we created a toolkit adapted to other EU contexts and developed a blended learning programme. The latter was tested by some NGO representatives from Slovenia within a 4-week e-learning programme. Based on their reflections and an evaluation of the complete e-learning programme, we adapted the programme so that it can be used by the partners. Last but not least, we used all of our work and findings to compile an open educational resource-based portal, which will serve the wider public, and presented it at the final conference which took place under the

¹ This project has been funded with support from the European Commission. This publication only reflects the views of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained herein. Details about the project: Erasmus+, Strategic Partnership for Adult Education, agreement number 16-KA204-021604, case number KA2-AE-9/16. The lead organisation was the University of Ljubljana; the partner organisations were the Slovenian Association of Adult Educators, the University of Algarve, the University of Wrocław, Tallinn University and the Association of Estonian Adult Educators – ANDRAS.

umbrella of the ESREA Research Network on Education and Learning of Older Adults (ELOA) in Ljubljana on 11th May 2019.

It is widely recognised that learning is influenced by many variables, such as educational background, gender, income level, geographical isolation, digital literacy, foreign language proficiency, etc. In the *Old Guys* project, we wanted to understand the patterns that emerge when analysing learning according to gender, local contexts and historical practices. In fact, statistical data shows that male participation in adult educational programmes in all partner countries (except Estonia) is lower than female participation. In Poland, it is even decidedly below the EU average for male and female genders (Eurostat, 2017). Moreover, we found that men's participation in adult education is showing a slower increase on average than women's participation, including at EU level (ibid.). As was the case in some past studies (Golding, Mark, & Foley, 2014), the partners of this project discovered that men are becoming minority participants in certain spaces and sectors of education, and that various national provisions, policies, and structural conditions of the population make it difficult to provide homogeneous explanations of this fact. Nevertheless, we examined the different causes of this issue in our own countries and in a variety of contexts, and searched for explanations that could provide some practical recommendations to the communities. The goal of the *Old Guys* project was thus to consider society and the role that men's learning can play in it more closely. This task was not chosen randomly: we considered numerous international studies as well as several previous studies carried out by the project team.

One of the few recent books dedicated to men's learning brings together exploratory research work from the United Kingdom, Ireland, Portugal, Greece, China, Australia and New Zealand. An important conclusion to be emphasised from these exploratory accounts was, precisely, that *informal learning based in the community* was very effective for men:

The research we have analysed shows that, almost counter-intuitively, the most effective learning for most men with limited prior experiences of learning is informal, local, and community-based, which builds on what men know, can do, and are interested in. Learning for such men is less effective if it assumes that all men have a problem, that particular masculinities *are* the problem, or if it requires them to be served up curricula and assessments for qualifications, vocational training or literacy, as students, customers, clients, or patients, which presupposes a deficit (Golding, Mark, & Foley, 2014, pp. 256–257).

Previous research in Australia (Golding, 2011; 2012) also showed that fostering learning among older men, especially those with high levels of illiteracy, could make a difference in various dimensions of their lives, positively affecting their well-being – namely their physical and mental health. Moreover, informal learning taking place informally in the community generated a huge social movement (the men's shed movement) in Australia that has similarities to more recent movements in a few European countries.

Previous exploratory research conducted in Slovenia, Estonia, Malta and Portugal (Jelenc Krašovec & Radovan, 2014) revealed some promising results. In these countries, there is a big diversity of informal, non-structured spaces where older men feel secure and where various activities had a direct and indirect influence on their well-being. These diverse learning spaces constitute symbolic spaces that frame people's sense of belonging, one built from symbols that have powerful meanings in the community (Kurantowicz, 2008). Illustrative examples of this statement can be found in Slovenia (Jelenc Krašovec, Radovan, Močilnikar, & Šegula, 2014), Estonia (Tambaum & Kuusk, 2014), Malta (Galea & Farrugia-Bonello, 2014), and Portugal (Ricardo, Tavares, Coelho, Lopes, & Fragoso, 2014). For us it becomes clear that the informal spaces where men interact have the ability to build a sense of belonging that ties them to the community and allows older men to positively contribute to their communities in some way. It is within these symbolic, informal spaces in the community that the importance of socialising appears to be crucial for older men. This is coherent with McGivney's (1999) claims that education is especially successful when it takes place in informal community spaces. Interacting socially is a way to fight back the natural, progressive deterioration of social networks generally associated with ageing. It can also prevent isolation and loneliness that can, associated with other factors, eventually reduce men's well-being.

An important finding of the previous research we had done in these countries refers to the activities and types of informal learning older men prefer (Jelenc Krašovec & Radovan, 2014). Our conclusions show that men tend to choose hands-on activities, problem-oriented activities in some cases, and those characterised by competition in others (either sports or simple games like dominoes or cards).

However, in many instances, what the case studies unearthed was an informal, situated, community-based and non-structured form of learning, millions of miles away from the rigid structures involving formal learning and vocational training that increasingly crowd in and create extra pressure on professional life. The informal learning style preferred by men is also deeply embedded in their own past and present experience, independent of the source of such experiential knowledge (stemming from work and working life, or roughly coming from leisure) (Fragoso & Formosa, 2014, p. 103).

We also know that the processes of ageing inevitably bring some social, physical and mental decay across time. Socialising, as we have stressed, is of utmost importance. We know that it is common that ageing brings with it the collapse of social networks and the progressive diminishment of intergenerational contacts (Salgueiro & Lopes, 2010). Nevertheless, even or especially in these cases, maintaining community ties and networks is still the best answer to the older citizens' situation:

For older adults – more so than for other social groups – the community level is of importance for their social life, when mobility decreases in later life. When

the radius of action becomes more limited also in a geographic sense, the local surrounding gets more and more important and becomes the most important resource of areas of action, learning opportunities, and intergenerational encounters (Formosa, Jelenc Krašovec, & Schmidt-Hertha, 2015, pp. 207–208).

Much depends not only on the way that older men make the transition to retirement, but also on their capacity of adapting to retirement. The transition to retirement is a process embedded in a number of overlapping contexts (Grenier, 2012), which force us to give special attention to a number of factors. It implies a loss of old social roles and their gradual replacement with new ones (Smeaton, Barnes, & Vegeris 2016). It depends on the subjective perceptions of how older citizens look at retirement, on their adaptive capacity and on how the potential states of vulnerability interfere with the ageing processes (Loureiro, Ângelo, Silva, & Pedreiro, 2015). Transition can therefore mean a path towards social isolation and individual progressive devaluing (Quaresma, 2007). On the other hand, numerous factors might contribute to a positive transition to retirement and to the agentic capacity of individuals to rebuild their social roles. Being active, socialising, and learning in the community are ways to promote the well-being of older citizens. The contributions in this issue of *Studies in Adult Education and Learning* discuss all of these aspects.

The analysis of the best practices which were selected in the *Old Guys* project revealed some interesting common patterns. However, due to the wide variety of national and local contexts, a comparative analysis was not possible. More than in segregated male communities, men engaged in various contexts that prioritised practical and informal activities which were often linked to their past professional activities. We also have to pay attention to contexts and meanings. In the case of Portugal, it is very common to find examples of environments in the community where men are predominant. To mention just a few: pigeon clubs, volunteer fire brigades, clubs for hunters and fishermen, *pétanque* clubs, among others. However, we cannot separate the fact from its historical and cultural origin. Very traditional divisions of gender roles, especially in rural areas, conducted the men towards the domination of public spaces as natural spaces of leisure. At the same time, women were constrained in their use of public space, condemned to live mainly in the private space of the household or rural small property. Furthermore, this leads us to the conclusion that it is very important to understand sociocultural contexts (the symbolic capital of a community, the identity of a community, etc.) because cultural characteristics and historical backgrounds create environments in which the focus on opportunities for older adults (also at the institutional level) is the norm and not the exception.

Our project focused on the careful study of the community, on the social mechanisms around the community as well as on the connection between the community, informal learning and the well-being of older men. Besides the transformation in communities and learning environments, we were also interested in the transformation of individuals. The motives of older men for participating in volunteer activities show they seek them

out mainly for socialisation. As educators, we often think this is not enough. Rather it is fundamental to anchor older men in the community, to keep their sense of belonging alive. Socialisation prevents isolation and tackles the shrinking of social networks. It is the base for building a community. Only in a community can citizens have the (learning) opportunities to improve their lives. All partners have revealed the importance of informal learning practices for older men. Through the involvement in volunteer associations, as members of the board, or just as associates or participants, older men maintain contact with their peers and younger people. Associations and workplaces are described as privileged spaces of socialisation, where older men can gather, play games or just talk about their past and present lives. This dimension seems to be of huge importance since this feature is referred to in all the partner countries. The associations or the gathering of men in the workplace intentionally or unintentionally provide learning or intergenerational opportunities, which are mostly informal.

What have we learned from the project? Comparative analysis is always very hard to make. Our four countries are very different from each other and include a diversity of contexts within. That being so, our task was to call attention to some general patterns without compromising the identity of each national research. National interpretations, conclusions, and recommendations will always be valid on their own internal merits and capable of being applied in national or local settings. Comparisons, in this case, were to call on commonalities when they exist, point to striking differences when useful, and are an important opportunity for critical reflection.

To this end, we identified four comprehensive topics which have up to now been given insufficient expert attention in the context of our countries: a) Pluralisation of transitions to retirement and ageing; b) Absent bodies and invisible lives; c) Hegemonic masculinities and gendered experiences; and d) Community-based learning, action and spaces. We also defined a series of subtopics which deserve further consideration both within the civil society sector and at the level of national authorities. These include especially ‘silver productivity and ageing’, ‘post work lives and identities independent of paid work’, ‘ageing (men’s) health-related behaviours’, ‘men’s vulnerability in old age’, ‘men’s mental health’, ‘incomplete script for performing masculinity in later life’, ‘re-defining gender capital in later life’, among others.

As the topic titles suggest, we discovered that the barriers to men’s participation in learning are numerous, diverse, multidimensional and partially emerging from context specificities. A list of all the barriers identified by partner organisations is now publicly available² but broader generalisation of this data would probably not be constructive. We do not expect, for example, that older men living in poverty and having difficulties even surviving with some dignity would have the necessary conditions to look for opportunities of learning in the community – taking for granted that they exist with some visibility

² The national recommendations for local authorities and NGOs are published at: <https://oldguys.si/recommendation-letters/> and the toolkit at <https://oldguys.si/toolkit/>.

in traditional forms accessible to these men. Frequently mentioned barriers that stay out of men's control include, for example:

- low incomes / unemployment / severe financial problems;
- the scarcity of informal learning offers / public spaces for gathering in the community;
- health problems, especially mental problems (dementia, etc.);
- mobility and difficulties in access to public transportation;
- social-geographic isolation and loneliness.

One could eventually say that other barriers to men's participation are somehow attitudinal or can at least be tackled more easily. The shrinking of social networks is not irreversible; the communication capacity can be learnt and developed; older men can learn more about ICT and suddenly begin to have immediate access to a new digital world and information on activities and learning; the willingness to participate can, in theory, depend on simple individual motives. All this is valid. There are, however, two problems when thinking about attitudinal barriers: the first is the circularity that learning presents in its causes and effects. For example, learning can foster participation; but participation requires learning and this fact can hinder men from learning in the first place. We have to understand what the trigger is to unlock some of these situations. The second problem is that we would have to assume that individual attitudes and choices are not determined by a set of inter-related, inter-subjective factors that go beyond the sphere of 'individual choice'.

It is also important to consider that some barriers the partners identified are very particular to a specific context, so we will not mention them here. But this does not mean they are unimportant. Barriers to participation, on the contrary, are the basis for local recommendations to civil society organisations and local power administration. They give us all something to work with and try to solve certain problems. In these conditions, what is truly remarkable is that our four countries are equal when it comes to the dominant forms of learning – and the relative absence of the remaining forms. The evolution in education; the expansion of formal education and the consequent diminishment of value given to informal learning; marketisation and commodification as increasing tendencies in most European countries... all of this and much more can explain the similitudes of what can be dominantly 'offered as learning'.

To conclude, we did find patterns of activities and cooperation in communities that differ between men and women; what is more, those patterns were presented through similar statements in different countries. Men are portrayed as lazy, more passive, preferring to stay at home, reluctant to cooperate, while women are depicted as assertive, active, always prepared to cooperate, etc. However, as andragogues, sociologists, and researchers, of course, we do not believe that these patterns express a 'biological deficit' that men possess or a 'biological advantage' that evolution has granted to women only. On the contrary, such patterns reflect the production and reproduction of gender, gender experiences and practices, which acquire different meanings and characteristics in later life compared to earlier life. Many other categories would better explain the occurrence of the same patterns in the four countries. Our introduction in this editorial has already provided

some explanations: men and women prefer different activities and types of learning. If the possibilities and conditions for hands-on practical activity, informal and with minimal structure are available, men will participate more. Whenever and wherever learning is more structured, planned, organised, women will participate more.

This bigger expression of women's social activity – or the minor expression of socially active men – no doubt has roots in inequality patterns, which are very common in Europe's past. We can notice that traditional gender roles are very similar in all four countries. They were based on male dominance, a profound asymmetry between the daily tasks of men and women, a full dominance of the labour markets by men, etc. The feminist movement emerged only about forty years ago. Education, and more precisely formal education, was a battle women had to win gradually. Generations of women across Europe saw education as an instrument (among others) of social mobility and the struggle against male domination. But even today, as we speak, this battle is not over. The labour market is still unfair and unequal, with barriers preventing women from getting to the top positions in the labour market and earning equal salaries, and women still fighting stereotypes that associate motherhood with low productivity, etc., without giving up their femininity. This means that qualifications, especially tertiary qualifications, are still crucial for women. Higher education is gradually more frequently attended by women than men. The fact that women are increasingly performing better than men in higher education allows for the speculation that generations of women across Europe still *live* formal education differently. And if socialised under these dominant perceptions, then it is only natural that they participate more when learning is formal and structured.

The five contributions we find in this special issue discuss specific aspects of the main pre-occupations of the *Old Guys* project. The contributions do not exhaust our findings and we will continue to try to publish our results. Moreover, we are aware of the limitations of the project and the need to continue our research efforts in the years to come. Our final comment thus goes out to our colleagues in the scientific community. Maybe you will find in this special issue the encouragement to contribute to this collective task: to increase our knowledge on this issue and provide practical solutions to improve older adult's quality of life.

Sabina Jelenc Krašovec, António Fragoso and Marta Gregorčič

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UVODNIK

DEJAVNEJŠE VKLJUČEVANJE STAREJŠIH MOŠKIH V SKUPNOST

V tokratni številki Andragoških spoznanj objavljamo pet prispevkov, ki so nastali na podlagi triletnih raziskav partnerjev projekta *Old Guys Say Yes to Community*.¹ Partnerji iz Slovenije, Estonije, Poljske in Portugalske smo ob podobnih izhodiščih proučevali nizko udeležbo starejših moških v izobraževalnih in učnih programih ter tudi nasploh v skupnosti. Ob podobnih smernicah raziskovanja tega pojava smo izvedli naslednje aktivnosti: najprej smo v svojih državah poiskali dobre prakse priložnostnega učenja starejših v skupnosti s poudarkom na starejših moških. Glavni namen je bil pridobiti vpogled v dejansko stanje učenja moških v skupnosti. Nato smo izvedli poglobljeno raziskavo, v okviru katere je vsak partner v izbranih skupnostih intervjuval vzorec 90 do 100 moških, starih 60 let ali več. Poleg tega so bile v teh skupnostih organizirane razprave v obliki fokusnih skupin, ki so vključevale lokalne odločevalce in člane organizacij civilne družbe. Organizacijska ekipa projekta je sestavila polstrukturirane vprašalnike za intervjuje in fokusne skupine, vsak partner pa je imel nekaj svobode pri prilagajanju teh vprašalnikov lokalnim kontekstom, kjer je bilo to potrebno.

Sledila sta izdelava vmesnega poročila in glede na ugotovitve raziskave oblikovanje nacionalnih priporočil. Priporočila so bila namenjena lokalnim organom in predstavnikom civilnodružbenih organizacij. Ob predstavljanju ugotovitev poročila smo poskušali pridobiti čim več konstruktivnih odzivov različnih javnosti in jih vključiti v nadaljnje delo, pa tudi analizirati razlike, ki so se pokazale v naših poročilih. Na podlagi priporočil, evalvacij in analiz smo oblikovali skupno orodje (*toolkit*), prilagojeno tudi drugim kontekstom EU, ter izdelali program kombiniranega učenja (*blended learning training*). Slednjega so v obliki štiritredenskega programa e-učenja preizkusili predstavniki nevladnih organizacij iz Slovenije. Na podlagi njihove refleksije in evalvacije opravljenega programa e-učenja smo tega prilagodili tudi za preostale partnerje. Ne nazadnje smo vse delo in spoznanja zbrali v odprto izobraževalno gradivo (*OER-based portal*), ki bo služilo tudi širši

1 Projekt je bil financiran s podporo Evropske komisije. Publikacija izraža stališča avtorjev prispevkov, pri čemer Komisija ni odgovorna za nobeno uporabo informacij, ki jih vsebuje. Projekt je nastal v okviru Erasmus+ (Strategic Partnership for Adult Education, sporazum: 16-KA204-021604, št. zadeve: KA2-AE-9/16), ki poteka med oktobrom 2016 in avgustom 2019. Vodilni partner projekta je bila Univerza v Ljubljani; partnerske organizacije so bile Andragoško društvo Slovenije, Univerza v Algarveju, Univerza v Vroclavu, Talinska univerza in Estonsko društvo za izobraževanje odraslih.

zainteresirani javnosti, in ga predstavili na sklepni konferenci, ki je potekala pod okriljem Evropskega omrežja za izobraževanje starejših odraslih (Education and Learning of Older Adults Network – ELOA) pri ESREA (Evropsko združenje za raziskovanje izobraževanja odraslih) 11. maja 2019 v Ljubljani.

Splošno znano je, da na učenje vpliva veliko spremenljivk, denimo izobrazba, spol, prihodki, geografska izoliranost, digitalna pismenost, znanje tujih jezikov in podobno. V projektu *Old Guys* nas je zanimalo, kakšni vzorci se bodo pojavili iz analize učenja glede na družbeni spol, lokalne kontekste in zgodovinske prakse. Statistični podatki namreč kažejo, da je v vseh partnerskih državah (z izjemo Estonije) udeležba moških v programih za izobraževanje odraslih nižja kot udeležba žensk, na Poljskem pa tudi izrazito pod povprečjem EU za oba spola (Eurostat, 2017). Prav tako smo ugotovili, da se tudi na ravni EU udeležba moških v izobraževanju odraslih v povprečju povečuje počasneje kot udeležba žensk (Eurostat, 2017). Podobno kot že nekatere prejšnje raziskave (Golding, Mark in Foley, 2014) smo tudi s partnerji v tem projektu ugotovili, da v nekaterih prostorih in sektorjih izobraževanja moški udeleženci postajajo manjšina, pa tudi, da je zaradi raznolikih nacionalnih določb, politik in strukturnih pogojev prebivalstva skoraj nemogoče najti splošno razlago tega dejstva. Smo pa raziskali različne vzroke za to težavo v svojih državah in v raznolikih kontekstih ter poiskali razlage, ki bi skupnosti okrepile s praktičnimi priporočili. Cilj projekta *Old Guys* je bil tako pobliže proučiti družbo in vlogo, ki jo v njej lahko ima izobraževanje moških. To ni bila naključna izbira projektne naloge, kajti upoštevali smo številne mednarodne raziskave, pa tudi predhodne raziskave, ki jih je že opravila projektna ekipa.

Ena izmed redkih knjig, ki raziskujejo učenje moških, objavljena nedavno, združuje raziskovalno delo iz Združenega kraljestva, Irske, Portugalske, Grčije, Kitajske, Avstralije in Nove Zelandije. Pomembna ugotovitev na podlagi tega poročila je bila, da je pri moških zelo učinkovito *priložnostno učenje, ki temelji na skupnosti*:

»Viri, ki smo jih analizirali, nasprotno od pričakovanega kažejo, da je za moške z omejenimi predhodnimi izkušnjami izobraževanja najbolj učinkovito priložnostno, lokalno, skupnostno učenje, ki temelji na tistem, kar moški že vedo, so že sposobni narediti in jih že zanima. Za take moške je učenje manj učinkovito, če se predpostavlja, da imajo vsi moški problem, da so določene moškosti problem. Manj učinkovito je tudi, če jim kot študentom, kupcem, strankam ali bolnikom ponudimo kurikulum in ocenjevanje za pridobitev kvalifikacij – s čimer predpostavljamo, da tem moškim nekaj manjka.« (Golding, Mark in Foley, 2014, str. 256–257)

Predhodne raziskave v Avstraliji (Golding, 2011 in 2012) so tudi pokazale, da bi lahko spodbujanje učenja med starejšimi moškimi, zlasti tistimi z visoko stopnjo nepismenosti, pozitivno vplivalo na več področij njihovega življenja in na njihovo splošno blaginjo – zlasti na njihovo fizično in duševno zdravje. Skupnostne oblike priložnostnega učenja

so v Avstraliji prerasle v pravo družbeno gibanje (»delavnice za moške«, v angl. »men's shed movement«). To gibanje ima podobnosti z nedavnimi družbenimi gibanji v nekaterih evropskih državah.

Tudi predhodne raziskave v Sloveniji, Estoniji, na Malti in Portugalskem (Jelenc Krašovec in Radovan, 2014) so prinesle nekaj obetavnih rezultatov. V teh državah obstaja veliko raznolikih neformalnih in nestrukturiranih prostorov, kjer se starejši moški počutijo varne in kjer različne dejavnosti neposredno in posredno vplivajo na njihovo dobro počutje. Ti raznoliki učni prostori tvorijo simbolne prostore, ki med ljudmi oblikujejo občutek pripadnosti. Ta občutek pripadnosti temelji na simbolih, ki imajo za skupnost močan pomen (Kurantowicz, 2008). Nazorne primere lahko najdemo v Sloveniji (Jelenc Krašovec, Radovan, Močilnikar in Šegula, 2014), Estoniji (Tambaum in Kuusk, 2014), na Malti (Galea in Farrugia-Bonello, 2014) in Portugalskem (Ricardo, Tavares, Coelho, Lopes in Fragoso, 2014). Tako nam postane jasno, da lahko neformalni prostori, kjer imajo moški možnost medsebojnega druženja, gradijo občutek vzajemnosti, ki starejše moške povezuje s skupnostjo in jim omogoča, da na svoj način pozitivno prispevajo k svoji skupnosti. V teh neformalnih prostorih v skupnosti s simbolnimi pomeni se zdi, da je druženje za starejše moške osrednjega pomena. To je skladno s trditvami McGivneyjeve (1999), da je izobraževanje še zlasti uspešno, ko se odvija priložnostno v skupnostnih prostorih. Druženje je način za preprečevanje naravnega postopnega zmanjševanja socialnih mrež, ki se pojavlja pri staranju. Druženje lahko prav tako prepreči izoliranost in osamljenost, ki lahko skupaj z drugimi dejavniki sčasoma negativno vplivata na blaginjo moških.

Pomembna ugotovitev naših prejšnjih raziskav v teh državah se nanaša na dejavnosti in vrste priložnostnega učenja, ki zanimajo starejše moške (Jelenc Krašovec in Radovan, 2014). Naši rezultati kažejo, da moški najraje izbirajo praktične dejavnosti, dejavnosti, ki so povezane z reševanjem problemov, ter v nekaterih primerih dejavnosti, za katere je značilna tekmovalnost (ali v športu ali pa v preprostih igrah, kot so domine ali karte):

»Pogosto so študije primerov odkrile priložnostne, lokalne, skupnostne in nestrukturirane oblike učenja, ki so daleč stran od togih struktur, povezanih s formalnim učenjem in poklicnim usposabljanjem, ki ustvarja vse večji pritisk na poklicno življenje. Priložnostno učenje, ki moške zanima, je ne glede na to, od kod izhaja izkustveno znanje (iz dela in poklicnega življenja ali pa iz prostega časa), globoko povezano tudi z njihovimi preteklimi in sedanjimi izkušnjami.« (Fragoso in Formosa, 2014, str. 103)

Vemo tudi, da skozi čas procesi staranja neizogibno vodijo k družbenemu, fizičnemu in duševnemu pešanju. Kot smo že poudarili, ima druženje velik pomen pri zadrževanju pešanja. Znano je, da proces staranja povzroča razpad socialnih mrež starejših odraslih in postopno zmanjšuje medgeneracijske stike (Salgueiro in Lopes, 2010). Kljub temu je tudi – oziroma je še zlasti – v teh primerih ohranjanje vezi v skupnostih in socialnih mrežah najboljša rešitev za položaj, v katerem se znajdejo starejši ljudje:

»Za družbeno življenje starejših odraslih, ki se jim v poznejšem obdobju življenja zmanjšuje mobilnost, je še bolj kot za druge družbene skupine pomembno področje skupnosti. Ko se njihova aktivnost zmanjša tudi v geografskem smislu, postaja lokalno okolje čedalje pomembnejše; postane tudi glavni vir aktivnosti, učnih priložnosti in medgeneracijskih srečevanj.« (Formosa, Jelenc Krašovec in Schmidt-Hertha, 2015, str. 207–208)

Veliko je odvisno ne le od načina, kako moški prehajajo v upokojitev, ampak tudi od njihove sposobnosti prilagajanja upokojitvi. Prehod v upokojitev je proces, ki je povezan z več prekrivajočimi se konteksti (Grenier, 2012), kar nas prisili, da smo pozorni na številne dejavnike. Upokojitev pomeni izgubo starih družbenih vlog in postopno zamenjavo z novimi (Smeaton, Barnes in Vegeris, 2016). Ta proces je odvisen od subjektivnega dožemanja upokojitve pri starejših odraslih, od njihove sposobnosti prilagajanja in od tega, kako potencialna ranljiva stanja vplivajo na proces staranja (Loureiro, Ângelo, Silva in Pedreiro, 2015). Prehod lahko torej pomeni pot k družbeni izoliranosti in posameznikovi progresivni izgubi vrednosti (Quaresma, 2007). Po drugi strani pa lahko številni dejavniki pripomorejo k pozitivnemu prehodu v upokojitev in k agentični sposobnosti posameznikov, da ponovno zgradijo svoje družbene vloge. Aktivnost, druženje in učenje v skupnosti so načini za spodbujanje dobrega počutja starejših občanov. Vsem tem vidikom se posvečajo prispevki v tej številki *Andragoških spoznanj*.

Tudi pri analizi dobrih praks, ki smo jih zbrali v okviru projekta *Old Guys*, smo odkrili zanimive skupne vzorce, četudi zaradi zelo različnih nacionalnih in lokalnih kontekstov ni bilo mogoče narediti primerjalne analize. Moški so se bolj kot v segregiranih moških skupnostih udeleževali v raznovrstnih kontekstih, kjer so bile v ospredju praktične dejavnosti, neformalne aktivnosti, pogosto vezane na njihovo preteklo poklicno dejavnost. Pri tem se je pokazalo, da je treba biti pozoren na kontekste in pomene. Na Portugalskem denimo v skupnosti zelo pogosto najdemo primere okolij, v katerih prevladujejo moški. To so recimo skupine za tekmovanja z golobi, prostovoljni gasilci, lovska in ribiški društva, društva za petanko, igro, podobno balinanju, in drugo. Te okoliščine ne moremo ločiti od njenega zgodovinskega in kulturnega pomena. Zaradi zelo tradicionalnih delitev vlog glede na spol, zlasti na podeželju, so moški prevladovali v uporabi javnih prostorov za preživljanje prostega časa. Ženske so bile pri uporabi javnih prostorov omejene in prisiljene, da živijo predvsem v zasebnih prostorih gospodinjstva ali majhnih podeželskih posestev. To nas nadalje pripelje do ugotovitve, kako pomembno je razumevanje socialno-kulturnega konteksta (simbolni kapital skupnosti, identiteta skupnosti ...), saj kulturne značilnosti in zgodovinska ozadja ustvarjajo okolja, kjer je osredotočenost na priložnosti za starejše (tudi na institucionalni ravni) norma in ne izjema.

Naš projekt se je osredotočal na pozorno proučevanje skupnosti in družbene mehanizme okoli skupnosti ter na povezavo med skupnostjo, priložnostnim učenjem in blaginjo starejših moških. Poleg transformacije v skupnostih in učnih okoljih pa nas je zanimala tudi

transformacija posameznikov. Pokazalo se je, da je druženje starejših moških ključnega pomena in da je druženje pogosto motiv za njihovo udejstvovanje. Kot izobraževalci pogosto menimo, da to ni dovolj. V resnici pa je bistveno, da starejši moški najdejo mesto v skupnosti, da ohranijo svoj občutek pripadnosti. Druženje preprečuje izolacijo in pomaga ustaviti krčenje socialnih mrež. Je temelj za gradnjo skupnosti. Le v skupnosti imajo lahko državljani (učne) priložnosti za izboljšanje svojega življenja. Vsi partnerji so v svojih raziskavah potrdili pomembnost priložnostnih učnih praks za starejše moške. Z vključevanjem v prostovoljska društva – naj bo kot odločevalci v njihovih upravnih odborih ali le kot člani – starejši moški vzdržujejo stike s svojimi vrstniki in z mlajšimi ljudmi. Društva in nekdanja delovna mesta opisujejo kot privilegirane prostore socializacije, kjer se starejši moški lahko družijo, igrajo različne igre ali pa se le pogovarjajo o svojem preteklem in sedanjem življenju. Ta značilnost je ključnega pomena, saj se pojavlja v vseh partnerskih državah. Društva in druženje moških na delovnem mestu namerno ali nenamerno zagotavljajo učne ali medgeneracijske priložnosti, še zlasti priložnostno učenje.

Kaj smo se naučili iz projekta? Primerjalna analiza vedno pomeni izziv. Vključene štiri države se med seboj zelo razlikujejo in zajemajo tudi zelo raznolike kontekste znotraj držav. Naša naloga je bila, da ohranimo identiteto vsake nacionalne raziskave in hkrati predstavimo splošne vzorce, ki se pojavljajo. Nacionalne razlage, sklepe in priporočila bo vedno mogoče uporabiti v nacionalnih okoljih. Cilj primerjave v našem projektu pa je bil poiskati skupne značilnosti, kjer obstajajo, opozoriti na presenetljive razlike, kjer so uporabne, in ponuditi pomembno priložnost za kritično refleksijo.

S tem namenom smo identificirali štiri obsežne teme, ki jim je bilo v kontekstu naših držav doslej namenjene premalo strokovne pozornosti: a) pluralizacija prehodov v upokožitev in staranje; b) odsotna telesa in nevidna življenja; c) hegemonске moškosti in družbenospolne izkušnje in č) učenje, delovanje in prostori, ki temeljijo na skupnosti. Prav tako smo opredelili vrsto podtem, ki zaslužijo dodatno obravnavo tako v okviru civilnodružbenega sektorja kot tudi na ravni državnih organov. Naj navedemo nekatere med njimi: srebrna produktivnost in staranje, življenje po delovno aktivnem obdobju in identiteta, ki ni odvisna od plačanega dela, vpliv zdravja na vedenje starajočih se moških, ranljivost starajočih se moških, nepopoln očrt udejanjanja moškosti v poznejšem življenju, redefiniranje družbenospolnega kapitala v poznejšem življenju.

Kot pokažejo že sami naslovi tem, smo ugotovili, da so ovire pri udeležbi moških v učenju številne, raznolike, večdimenzionalne in da delno izhajajo iz specifičnosti konteksta. Seznam vseh ovir, ki so jih identificirale partnerske organizacije v projektu, je zdaj javno dostopen,² še večja generalizacija teh podatkov pa najbrž ne bi bila konstruktivna. Vendar se zdi pomembno poudariti, da so mnoge od teh ovir, ki so jih identificirali partnerji, zunaj nadzora starejših moških in so globoko zakoreninjene v strukturah. Ne pričakujemo, na primer, da imajo starejši moški, ki živijo v revščini in se trudijo ohraniti nekaj

2 Nacionalna priporočila za lokalne organe in nevladne organizacije so objavljena na <https://oldguys.si/sl/priporocilna-pisma/> in orodje na <https://oldguys.si/toolkit/>.

dostojanstva pri samem preživetju, potrebne pogoje za iskanje priložnosti za učenje v skupnosti – tudi če predvidevamo, da take priložnosti obstajajo in jih lahko ti moški najdejo. Pogosto omenjene ovire, na katere moški ne morejo vplivati, so, denimo:

- nizek dohodek, brezposelnost oziroma huda finančna stiska;
- pomanjkljiva ponudba priložnostnega učenja oziroma javnih prostorov za druženje v skupnosti;
- zdravstvene težave, zlasti duševne (demenca);
- mobilnost in z javnim prevozom povezane težave;
- socialno-geografska izoliranost in osamljenost.

Druge ovire za sodelovanje moških so delno odvisne tudi od njihovega odnosa ali pa jih je lažje reševati. Zmanjševanje socialnih mrež ni nepopravljivo; komunikacijskih veščin se lahko naučimo in jih razvijamo; starejši moški se lahko priučijo uporabe informacijsko-komunikacijskih tehnologij (IKT) in tako dobijo dostop do novega digitalnega sveta ter informacij o dejavnostih in učenju; pripravljenost na sodelovanje je lahko v teoriji odvisna od preprostih motivov posameznika. Navkljub tem dejstvom pa obstajata dva problema pri razmišljanju o ovirah, izhajajočih iz odnosa posameznika. Prvi je krožnost učenja v svojih vzrokih in učinkih. Učenje spodbuja udeležbo, toda udeležba zahteva učenje in lahko moške že na začetku ovira pri učenju. Poskušati moramo razumeti, kje sploh začeti v takih situacijah. Drugi problem je dejstvo, da bi pri takem razmišljanju morali predvideti, da odnosi in izbire posameznika niso določeni z medsebojno povezanimi, medsubjektivnimi dejavniki, ki presegajo področje »individualne izbire«.

Pomembno je tudi upoštevati, da so nekatere ovire, ki so jih identificirali partnerji, zelo specifične za določen kontekst, zato jih tukaj ne bomo omenjali. To pa ne pomeni, da niso pomembne. Nasprotno, ovire za sodelovanje so temeljni podatek za lokalna priporočila organizacijam civilne družbe in lokalni upravi. Razkrivajo nam izzive, ki jih lahko poskušamo reševati. Resnično zanimivo pa je tudi dejstvo, da so si vključene štiri države podobne glede prevladujočih oblik učenja in glede relativne odsotnosti drugih oblik. Razvoj na področju izobraževanja; širjenje formalnega izobraževanja in posledično zmanjšanje pomena priložnostnega učenja; nagibanje večine evropskih držav k tržni naravnosti in komodifikaciji – vse to in še veliko več lahko razloži podobnosti v prevladujoči ponudbi »učenja«.

Naj sklenemo: res smo v skupnostih našli vzorce aktivnosti in sodelovanja, ki se razlikujejo med moškimi in ženskami, še več, v različnih državah so bili ti vzorci predstavljeni prek podobnih izjav. Moški so upodobljeni kot leni, bolj pasivni, raje ostajajo v stanovanju, ne sodelujejo zlahka, medtem ko so ženske upodobljene kot odločne, aktivne, vedno pripravljene na sodelovanje. A kot andragogi, sociologi in raziskovalci seveda ne verjamemo, da ti vzorci izražajo »biološki primanjkljaj« moških ali »biološke prednosti«, ki jih je evolucija dala samo ženskam. Nasprotno, ti vzorci izražajo produkcijo in reprodukcijo družbenega spola in družbenospolnih izkušenj in praks, ki pa v poznejših življenjskih obdobjih prevzamejo drugačne pomene in značilnosti kot v prvih življenjskih obdobjih. Številne druge kategorije bolje pojasnjujejo pojav enakih vzorcev v štirih

različnih državah. Že v začetnem delu tega uvodnika smo dali nekaj pojasnil: moške in ženske zanimajo različne dejavnosti in načini učenja. Če obstajajo možnosti in pogoji za praktične, priložnostne dejavnosti z minimalno strukturo, se jih udeležujejo moški. Če je učenje bolj strukturirano, načrtovano, organizirano, se ga udeležujejo ženske.

Eden od ključnih razlogov, da so ženske bolj družbeno aktivne – ali da so moški manj družbeno aktivni –, ima korenine nedvomno tudi v vzorcih neenakosti, ki so zelo pogosti v evropski zgodovinski preteklosti. V vseh partnerskih državah lahko opazimo podobno tradicionalno delitev vlog glede na spol. Te vloge so temeljile na moški dominaciji, na globoki asimetriji med dnevnimi nalogami moških in žensk, na popolni nadvladi moških na trgu dela. Feministično gibanje se je pojavilo šele pred približno 40 leti. Izobrazba – natančneje formalna izobrazba – je bila pravica, ki so si jo morale ženske šele postopoma priboriti. Generacije žensk po vsej Evropi so izobrazbo razumele kot instrument za izboljšanje družbene mobilnosti in kot boj za osvoboditev izpod moške nadvlade. Tudi v današnjem času ta bitka še ni končana. Trg dela je še vedno nepravilčen in neenak in postavlja ovire ženskam na poti do višjih položajev, do služenja enakovrednih plač, še vedno je potreben boj proti stereotipom, ki povezujejo materinstvo z nizko produktivnostjo, ob tem ko trg dela od njih zahteva, da izgubijo svojo ženskost. To pomeni, da so kvalifikacije, zlasti terciarne, še vedno ključnega pomena za ženske. V visoko šolstvo se postopoma vključuje več žensk kot moških. Dejstvo, da so ženske v visokem šolstvu vse bolj uspešne kot moški, kaže, da generacije žensk po Evropi še vedno drugače doživljajo formalno izobraževanje. Če so bile vzgajane pod vplivom teh prevladujočih idej, je logično, da bodo ženske sodelovale le, če je učenje formalno in strukturirano.

Pet prispevkov, ki jih najdemo v tej posebni številki, obravnava specifične vidike glavnih vprašanj projekta *Old Guys*. Ti prispevki ne izčrpajo naših ugotovitev, zato bomo še naprej poskušali objavljati naše rezultate. Še več, zavedamo se omejitev projekta in potrebe po nadaljevanju raziskovalnih prizadevanj v prihodnjih letih. Naša zadnja pripomba gre torej k našim kolegom iz znanstvene skupnosti. Morda boste v tem posebnem vprašanju našli spodbudo, da prispevate k tej skupni nalogi: povečati naše znanje o temi in zagotoviti praktične rešitve za izboljšanje kakovosti življenja starejših odraslih.

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Marta Gregorčič

BOTTOM-UP STRATEGIES FOR COMMUNITY ENGAGEMENT AND INFORMAL LEARNING: TARGETING MEN AGED 60 YEARS OR MORE

ABSTRACT

The article presents findings from a large-scale qualitative research study conducted as part of a three-year Erasmus+ project entitled Old Guys Say Yes to Community, which included partners from Slovenia, Portugal, Poland and Estonia. The project explored how inactive ageing affects the quality of life, health and well-being of men aged 60 years or more, and how (self-)exclusion from the community can lead to social and psychological 'death'. The article highlights four interconnected themes which are inadequately, insufficiently, or simply not addressed by national institutions and often also the non-governmental sector in the researched countries. The themes – the pluralisation of transitions to retirement and ageing; absent bodies and invisible lives; hegemonic masculinity and gendered experiences; and community-based learning, action and spaces – are supported by well-defined issues and obstacles preventing men from integrating into the community and are completed with suggestions and recommendations to implement much-needed changes. In addition to these four themes, the article touches upon a series of subtopics and questions that should be addressed by further scientific research in the observed countries.

Keywords: *transitions to retirement, silver economy, productivity, hegemonic masculinity, gender identity, community-based learning and actions*

VKLJUČUJOČE STRATEGIJE ZA SKUPNOSTNO USTVARJANJE IN PRILOŽNOSTNO UČENJE PRI CILJNI SKUPINI MOŠKIH, STARIH 60 LET ALI VEČ – POVZETEK

Članek predstavlja ugotovitve obsežne kvalitativne raziskave, ki je potekala v okviru triletnega projekta Erasmus+ Old Guys Say Yes to Community s partnerji iz Slovenije, Portugalske, Poljske in Estonije. V projektu so bile proučevane posledice nedejavnega staranja moških, starih 60 let ali več, za kakovost njihovega življenja, zdravje in počutje, ki lahko vodijo tudi v (samo)izključevanje iz skupnosti ter s tem v socialno in psihološko »smrt«. Članek osvetljuje štiri medsebojno povezane tematike, za katere je bilo ugotovljeno, da jih državne institucije v vključenih državah, pogosto pa tudi nevladni sektor, neustrezno

ali nezadostno rešujejo, najpogosteje pa se z njimi sploh ne ukvarjajo. Tematike – pluralnost prehodov v upokojitev in staranje; odsotna telesa in nevidna življenja; hegemonске moškosti in družbenospolne izkušnje ter na skupnosti temelječi učenje, prostori in početja – so podprte z natančno definiranimi problemi in ovirami za vključevanje moških v skupnost, hkrati pa dopolnjene s predlogi oziroma priporočili za prepotrebne spremembe. Članek poleg navedenih tematik nakaže tudi celo vrsto podtematik in vprašanj, ki bi jih bilo smiselno vključiti v nadaljnje znanstvene obravnave v državah, ki so bile proučevane.

Ključne besede: *prehodi v upokojitev, srebrna ekonomija, produktivnost, hegemonsko razumevanje moškosti, družbenospolna identiteta, skupnostno učenje in početja*

INTRODUCTION

The article presents selected findings of the project *Old Guys Say Yes to Community*¹, developed with European partners from Slovenia, Portugal, Poland and Estonia. Since September 2016, the project has been coordinated by the Faculty of Arts, University of Ljubljana, in collaboration with three partner universities and two non-governmental organisations dealing with the learning of older adults². The aim of the research project was to find out how to improve the participation of older men aged 60 years or more in the local community and, in particular, how to encourage older men's socialisation, informal learning and inclusion in organisations which are not primarily meant for education and learning in the third and fourth life stages.

The background that drew the project partners to the research was the recognition that significantly fewer men in the third and fourth life stages than women of the same age realise the importance of lifelong learning and of the advantages of active participation in the community. The low participation rates of older men in organised learning programmes and other free-time activities are evident from a number of research studies (Merriam & Kee, 2014; Schuller & Desjardins, 2007; Tett & Maclachlan, 2007), many of which link this to the men's quality of life, which is lower than the opportunities available to them and their environments otherwise allow (Courtenay, 2000; Golding 2011a, 2011b; Oliffe & Han, 2014). Some researchers also demonstrate that older men marginalise, isolate and alienate themselves more frequently than their female partners (McGivney, 2004; Williamson, 2011; Vandervoort, 2012), that they are more likely to be subjected to loneliness in old age (Wang, Karp, Winblad & Fratiglioni, 2002; Paúl & Ribeiro, 2009), and that they increasingly rely on their wives and life partners, depending on them emotionally as well as in terms of care, etc. (Vandervoort, 2012; Dettinger & Clarkberg, 2002).

1 Erasmus+, Strategic Partnership for Adult Education, agreement number: 16-KA204-021604, case number: KA2-AE-9/16.

2 The lead organisation was the University of Ljubljana; the partners organisations were the Slovenian Association of Adult Educators, the University of Algarve, the University of Wrocław, Tallinn University and the Association of Estonian Adult Educators – ANDRAS.

Various statistical data also confirm that older men are less active than women. The largest discrepancies in women's favour when it comes to participation in active ageing community programmes in the countries monitored by Eurostat have been found in Sweden (14%), Denmark (9.9%), Finland (7.7%), Iceland (7%), Estonia (5.5%) and France (4.9%) (Eurostat, 2017). Although men are more active than women in Croatia, Germany, Turkey and Switzerland, the difference is practically negligible (between 0.2 and 0.6%) (ibid.). It should be considered that besides cultural and religious aspects, these are gendered experiences, an aspect discussed further on in this article. The project partners came to similar conclusions in different national contexts: that the discrepancy in women's favour is even greater than seen in the statistics, and that men's participation in various organised active ageing and lifelong learning programmes is substantially more limited. For example, the average share of men in Activity Day Centres in Ljubljana or the Third Age University in Slovenia is 15%. Adult Education Centres and Third Age Universities are similarly perceived as predominantly women's organisations managed by women.

According to the main findings of our research, this article discusses four less thematised issues that have been revealed through extensive research in all partner countries and which we believe emphasise the core themes that should be considered by local and national authorities as well as by civil society and NGOs dealing with active ageing, lifelong learning and the well-being of older adults. The identified themes are: a) The pluralisation of transitions to retirement and ageing; b) Absent bodies and invisible lives; c) Hegemonic masculinity and gendered experiences; and d) Community-based learning, action and spaces. The next section outlines the methodology of the study. The third section discusses all four themes with sub-topics and main problems or obstacles, while the fourth section provides recommendations and suggestions for changes. The concluding section sums up the additional relevant findings from the project.

THE METHODS AND THE SAMPLE

As part of our project we undertook an extensive qualitative research study in 2017. Each partner country carried out three focus groups including representatives of NGOs and national institutions, ninety to one hundred semi-structured interviews with men aged 60 years or more, analyses of ten examples of good practice of the men's participation in their communities or elsewhere, analyses of national strategies and analyses of professional and scientific literature. The semi-structured interviews took an average of one hour and a half and they were, as a rule, conducted by qualified interviewers at the interviewees' homes, organisations they participate in or in 'safe spaces' where they felt comfortable. The interviews consisted of four sets of questions: (1) the interviewees' personal life histories; (2) their roles in the community and their understanding of the community; (3) an assessment and understanding of the lives of men aged 60 years or more in their communities; (4) their engagement with and participation in non-formal and informal organisations as well as the advantages in knowledge, skills, attitudes and practices they had gained in that way.

To analyse the interviews, each partner chose the most appropriate qualitative content analysis and coding methods for their context and the realities revealed on the research field. In Slovenia the method of open coding and selective/focused coding (Glaser, 1978; 1992) was used. In Poland, Glaser (1992) as well as Schütze (2012) and Rosenthal (1993) were used. The qualitative content analysis of Schreir (2012) was used in Portugal, and Franzosi (2008) in Estonia. During the coding process and the first results, the partners discussed their findings, compared them and searched for similarities as well as differences. Due to diverse national and local contexts, educational and historical background, rich and diverse participants' life histories, etc., the partners gained very scattered results almost impossible to compare. Because of such a diverse research field and heterogeneous research data even within a partner country, we faced many difficulties to find coherent content analysis and results applicable for different communities (regions or country) presented in recommendation letters for local NGOs and local authorities in the researched countries. However, during the one-year process, each partner had many discussions with relevant stakeholders (civic society, local and national authorities, etc.), and finally common reflections brought us to common results, applicable also to other countries. However, there are four core themes highlighted in this article that appeared in each of the partner countries and which we believe deserve special attention in further research.

FINDINGS

The pluralisation of transitions to retirement and ageing

As revealed in our study, 'retirement is a break-even point' for older adults: the greater the importance of employment during the working period and the more time the seniors had devoted to it, the greater were the problems that arose with retirement, especially with no substitute activities. Forced retirement and intimidation with high taxation for post-retirement work were also very destructive for older adults and contributed to their inactivity in later life. The very 'start of retirement' meant a significant change for our interviewees especially in terms of 'time that remains and there is too much of' and 'time that now needs to be filled with something', and 'alternative activities' that have to be sought out. The change was most traumatic for those who faced it alone and those whose social networks had been built exclusively around their jobs.

In our societies it is expected that seniors stop their work activities on the day of retirement. It is a moment when they are permanently expelled from the labour market. They become 'receivers', 'a burden to society', 'non-active' members of society, requiring help and care, etc., perceived as a subordinate group. Facing ageing unprepared and alone increase vulnerability among older adults besides weakening the cognitive and cultural capital in the third and fourth life stages. Narratives pointed to the erasure of the men's past life histories: the work and activities of the men's working lives were lost or had ceased; some industries, professions, hobbies and other leisure activities have been dissolved,

acquired a new function, or have ceased completely. They could no longer engage in some activities due to a decline in physical fitness and health. Many public places for meeting and socialising from the working lives of older men are gone, have either been privatised or appropriated by other generations. Furthermore, they proved that there is a lack of information about the possibilities open to them and the already existing activities and programmes in the community: it is often unclear how to access the dispersed information about opportunities for older adults.

In a quantitative research study of more than 2,000 interviewees (men and women) aged between 50 and 69 years from Germany, Schmidt-Hertha and Rees (2017) found that satisfaction with the workplace in all stages of the career, the positive perception of work and high personal identification with the workplace are crucial elements on the path to retirement or motivation for delaying retirement. Newly appearing practices of bridge employment (part-time work before retirement) and re-careering (a second career after legal retirement) (Boveda & Metz, 2016) in some EU countries advocate new approaches regarding 'work vs. retirement'. Therefore, we believe that there are three subtopics that should be given more public, political and scientific attention in the future. The first is 'silver productivity and ageing', the second is 'post work lives and identities independent of paid work' and the third is 'ageing (men's) health-related behaviours', already highlighted by Peak and Gast (2014), with special attention given to the influence of the hegemonic masculinity framework over the life span, also discussed later in this article.

With these subtopics we tried to address the positive and gradual confrontation with the changes brought about by the third life stage. Such men can remain productive, take on (educational) mentorship, mediation, developmental and motivational roles in the company/organisation (transfer of practices, knowledge, experience, skills, competences), which bring them a sense of fulfilment and satisfaction. A further but new type of activity keeps them productive, agile, valued (important), and in fact supportive for the company, the industry, the business, the wider community, and their local environment. "Facing a pluralisation of transitions to the after-working phase of life, including different forms of intermediate stages, educational programs to design the transition and the stage of life after work, seems to be more relevant than ever" (Schmidt-Hertha & Rees, 2017, p. 51). Besides, seniors need to develop identities independent of the paid work that occupied them their whole working life. As seen in the cases of community-based activity, particularly in community Men's Sheds developed in Australia (Carragher & Golding, 2015; Golding, 2015; Mackenzie et al., 2017), such spaces allow "opportunities for regular, social interaction and hands-on activity in groups, within organizations and the wider community" (Golding, 2011a, p. 41). The value of this interaction is more than knowledge or skills-based; it is particularly powerful, therapeutic and likely to have broader wellbeing benefits when it is physical and social, involving other men and contributing to the organisation and the community (ibid.).

Absent bodies and invisible lives

The transition from employment to retirement has changed significantly in the EU in the last decades. Not only are the years of service extending and the retirement age increasing, but pensions are also falling and they no longer guarantee a decent life (Schmidt-Hertha & Rees, 2017). Retirement can be a breaking point in a variety of ways: psychologically, it is seen as a developmental task, as a longer-term process, or a critical life event (Filipp & Olbrich, 1986). The loss of identifying activities points to the loss of self, the loss of worthwhile projects that reflected one's personality, and also the loss of the meaning of life (Wijngaarden, Leget & Gossensen, 2015). Primarily it can mean a significant cut in people's biographies (Schmidt-Hertha & Rees, 2017). Krajnc (2016) acknowledges that building a new meaning of life is a necessary preparation for a successful transition to retirement. Forcing older people into a social and psychological 'death' after retirement by not giving them the opportunity to fully experience the new life situation that they are entering can be devastating (Krajnc, 2016). The collective effort of the project partners was to call attention to men aged 60 or more, whose gendered experiences and social lives are different from women of their age as well as younger men. Our project identified nine complex obstacles/disadvantages showing the vulnerability of men in later life, which continue to be taboo issues in hegemonic masculinity discourse, and that often affect women as well.

First among them is 'becoming a nobody': solitude, (self-)isolation and (self-)marginalisation among older adults (particularly men) and the status/identity change have many consequences for health and well-being among older adults. Second, accessibility to quality services, adequate public infrastructure and mobility have become a major technical (and, above all, financial) obstacle for older adults with the degradation of the welfare and/or social state, which has a significant impact on their health and quality of life. Third, besides health issues and services (indicated by all partners), a number of other necessary services have become payable, while access to institutions and mobility in general is often inadequate. Special attention should also be paid to mental health and mental issues, underestimated and inadequately dealt with in all partner countries. Because of these problems, the men reported losing their independence and autonomy. Furthermore, poverty and financial distress as well as poorly managed home and social services were identified in all of the researched countries, as was the absence of adequate or sufficient social policies that would allow the community to be the centre of the resolution to the problems of older adults. Because the men have lost the position they used to have, they often do not know how to participate in an informal/non-formal environment where activities are led by women. Subsequently, discomfort was expressed from various perspectives concerning the spaces in which men are a minority, and recognition that men rarely approach (new) activities without the personal encouragement of their partners or important friends. Spaces for older adults are poorly marked, invisible and somehow hidden from community members. The interviewees showed a strong dependency on their life partners as companions and a strong emotional, social and informational reliance on them. They

also stressed a strong need for political participation and active citizenship (particularly in the case of Slovenia, but not in Estonia). Last but not least, our study revealed (particularly in the case of Portugal) that men with a very low educational background find themselves in extremely limited and vulnerable situations in old age compared to those with a middle or higher level of educational background.

In view of all these obstacles and problems it is important to find out why in a number of countries, including Estonia, Poland, Portugal and Slovenia, older men have been, essentially speaking, excluded as relevant participants of society, because the consequences of their (self-)marginalisation and isolation can be dramatic. It is also important to find out why men aged 60 or more are perceived as absent and invisible in contemporary discourses (Fleming, 1999). Men's (self-)exclusion and inactivity in the third and fourth life stages have a significant impact on the quality of their lives, on cognitive and mental capital (Golding, 2011a, 2011b), on emotional well-being (Williamson, 2011) and, of course, most importantly, on their health (Courtenay, 2000; Golden, Conroy & Lawlor, 2009; Mark & Golding, 2012). Creating opportunities for participation in civic engagement in later life can have a significant impact on the social aspects of men's lives and health in general. In this regard two interconnected subtopics should be discussed and implemented in development strategies: particularly 'men's vulnerability in old age' (male suicide risk, depression, chronic illnesses and functional disabilities, financial difficulties, widowhood, solitude, etc.) (Canneto, 2015) and 'men's mental health' (masculinities and men's health, retirement-related depression and death) (OliFFE & Han, 2014). Numerous social factors strongly influence health quality and well-being in old age as well.

Hegemonic masculinity and gendered experiences

The shorter life span of men is often presumed to be natural and inevitable; however, our research as well as prior studies (Courtenay, 2000) have found that men are more likely than women to adopt beliefs and behaviours that increase their health risks, and are less likely to engage in behaviours that are linked with health and longevity. Besides different behaviours and lifestyle, hegemonic masculinity and gender identity play an important role in ageing as well. "Gender capital may be an extremely useful concept for exploring men's and women's movement through occupational social spaces, and thus sheds light on the continuity and reproduction of occupational segregation" (Huppertz & Goodwin, 2013, p. 294). Since the social construction of masculinities has garnered much attention in academic literature, more and more in-depth studies are emerging, arguing that masculinities are not easily defined (Mackenzie et al., 2017; Golding & Foley, 2017) as gender practices shift under the influence of historical narratives as well as social, political and economic structures (Connell & Messerschmidt, 2005; Creighton & OliFFE, 2010), and that hegemonic masculinities are often represented by established stereotypes and structures that influence how men think and act in relation to their view of what 'being a man' means (Mackenzie et al., 2017).

Many scholars argue that masculinity is becoming more 'inclusive': more egalitarian, non-traditional and active in incorporating and adopting previously stereotypically

feminine attributes, values, and practices (Anderson, 2009; Huppatz & Goodwin, 2013). Others suggest that while these changes are apparent, they are not as extensive as some think and they have done little to alter structurally embedded gendered power relations and indeed might be happening as a way of maintaining these established relations within a neoliberal economic landscape (Bridges & Pascoe, 2014; Mackenzie, et al., 2017). However, there are only few studies dealing with gendered experiences, gender capital and hegemonic masculinity in later life.

Besides the obstacles and problems already stated in prior sections that encompass gender issues, the project partners have found that older adults are mostly seen and treated as de-gendered. Gleibs et al. (2011) found out that gender imbalance and the de-emphasis on gender identities can have important implications for men's psychological well-being and the way they think about and perceive themselves. Barefoot et al. (2001) observed that men but not women showed an increase in non-somatic depression symptoms from age 60 onwards; they explained these results in terms of a shift in social roles and that the loss of social networks might be greater for men than for women. Our research revealed that older adults are treated as a homogenous group not only by care institutions or senior services but also by academics, the media, etc. Furthermore, activities for older adults mostly take place in age-segregated communities/places instead of in intergenerational community contexts. Unsuitable or inadequate existing activities (predominantly women's activities, themes, spaces, women participants, women's leadership) and the fragmentation of the institutions working with older adults often lead to men's withdrawal from the community to 'their safe spaces' (for example, to their pub) where they can foster hegemonic masculinities, etc. They become passive observers instead of active stakeholders in the community.

The findings in Slovenia showed that appropriate community places where men would be able to do 'their' activities – particularly connected with handwork and craft work – could work out in any community place, together with women's programmes, only if the place had a 'common' characteristic (open, autonomous, inclusive, suitable for encounters, discussions, co-working, socialising, etc.). The emphases were different in the other partner countries; however, the need for 'alternative programmes' was mostly due to social factors, especially poverty and low pensions that do not enable older adults to live decent lives, as well as proper/suitable community spaces that have vanished within the neoliberal landscape. The analyses of our research, particularly the collected examples of good practice, identify the advantages of men's clubs, men's sheds, men's spaces and activities, and even safe community houses/spaces for some groups of men, where they can socialise with each other (Reynolds et al., 2015), offering mutual support and where they can self-organise and redefine *masculine capital* to achieve older men's empowerment (Hanlon, 2012; Ribeiro, Paúl & Nogueira, 2007; Carragher & Golding, 2015). However, we estimated that men-only activities should be imposed only when other possibilities and options are inadequate for the specific local community.

Community-based learning, actions and spaces

Unlike women, who participate in the most varied areas in public, private and family life, men's learning happens mostly in informal community spaces (Jelenc Krašovec & Radovan, 2014). There are many reasons for men's non-participation in existing activities, among others, the dominant *masculine capital* that determines men's (self-)exclusion, their unwillingness to enter learning communities (classrooms, educational institutions) that are frequently feminised (Carragher & Golding, 2015; Owens, 2000), the negative perception of their schooling in the past and/or low level of education (Mark & Golding, 2012; McGivney, 1999, 2004), the weakening of cognitive and social capital, which is part of the ageing process and which affects men more than women (Merriam & Kee, 2014; Schuller & Desjardins, 2007; Tett & Maclachlan, 2007), etc. The *Old Guys* interviewees' biographies revealed that the activities and lifestyle of the first two life stages determine the activities and lifestyle in the third and fourth life stages.

Besides the many obstacles and problems that allude to community learning and doing already identified in prior sections, there are also some paradoxes that occurred during the research. While talking about the engagement of older adults with the community, our interviewees expressed a strong desire to transfer their knowledge, skills, life stories, etc. They also did not want to be in a subordinate position or in a position of ignorance, or to be taught (especially by younger 'experts'), but wanted to transfer their knowledge and experiences to others, especially younger people, and craved such interactions. They also craved for political participation and decision-making processes (except in the case of Estonia). Another paradox is that older adults are often represented as a 'burden' in public discourse; much less they are portrayed as 'agents of progress' and respected for their invaluable contribution to the community, as revealed in the analyses of the project's focus groups. Their past and present contribution to the community is often neglected. The analyses also revealed that democratic and participatory processes are needed for the greater involvement of older adults in consultation and other practices that would enable them to contribute to the community that would not need to happen separately or segregated from the rest of the society.

Prior findings on the informal learning of older adults in participatory intergenerational community processes showed that (a) being a part of social action groups offers older adults an opportunity to learn about younger generations and their values; (b) for many older people, participation in the community constitutes an investment into future generations and offers them a sense of solidarity; (c) even if intergenerational cooperation and exchange is not a primary goal of community engagement, these dimensions have substantially and positively changed as a result of participation in mutual deliberation and actions between different generations; (d) collaborative decision making in mixed age groups led to an increased acceptance and tolerance by older and younger members; (e) the knowledge and skills that are necessary for social solidarity, intergenerational cooperation, awareness of others and social harmony increased most notably as a result of participation in the process of the self-organisation of citizens to enhance engagement in civic society (Jelenc Krašovec & Gregorčič, 2017).

Golding (2011a) demonstrates that social, local and situated learning can be the key for researchers and civil society to test ways of diminishing the levels of exclusion of the male population, while Reynolds et al. (2015) similarly recognised that male-oriented community programmes that embody similar characteristics to Men's Sheds have the potential to help men maintain meaningful connections to the activities and roles that they developed throughout their lifetime. As indicated by Fragoso et al. (2014), informal learning spaces are "crucial for the community to increase its level of organisation, to encourage participation, and to open doors so that adults can autonomously select those paths considered important for the future of the community or those activities that can have a positive effect on their lives." (p. 30) Drawing on two case studies in Malta, Formosa, Galen and Bonello (2014) came to similar findings as our project partners while searching for examples of good practices: that older men's learning occurs in avenues that are not customarily thought to be educational contexts (such as self-directed activities or learning projects, or as part of social institutions dealing with adult members or even learning connected to social movements) resulting in clear benefits for older men themselves and society in general.

DISCUSSION: BOTTOM-UP STRATEGIES FOR COMMUNITY ENGAGEMENT AND INFORMAL LEARNING

The *Old Guys* project found out that there were not any formal retirement preparation programmes in the researched countries. Therefore, programmes aiming to prepare seniors for old age and give meaning to old age should be developed and promoted within public institutions, trade unions and through NGOs. Such programmes are needed not only for older adults before retirement but in fact significantly earlier. Instead of forced and early retirement, laws should be drawn up to institutionalise gradual/partial retirement practices and a 'silver economy', and to encourage the economic integration of older adults. An inclusive longevity society could be developed through practices of old-new careers, involving older adults in mentoring, training, mediation, development, strategic, motivational, etc. roles/working groups/programmes in institutions and companies. Good examples of encouraging the positive perception of productivity and creativity could be done within public institutions and trade unions, for example. 'Partnerships' with older adults to activate a large spectrum of their untapped skills and rich experiences should be financially supported, and their work disseminated.

Research has shown that activities in the first two life stages decisively determine cognitive, social and cultural capital in the third and fourth life stages. Therefore, young people should also be informed and educated about the process of ageing and about old age (not only retirement). At the same time, this would encourage society in general (and not just older adults) to change the traditional and stereotypical views of old age and ageing. Our project also proved how older adults are mostly providers of wider development in the community through their volunteer, mutual and charity work (though mostly done by women), therefore national and local authorities must enable ways for older adults

to transfer their knowledge, practices and skills to the wider population, strengthening intergenerational translation and exchange in cooperation with civic society and NGOs.

The need for corresponding public spaces could be seen throughout the men's narratives, which brings us to the suggestion that local authorities should evaluate the quantity and quality of public spaces. This evaluation should take into account the quality of access and transportation and their adequacy to promote different uses of the public spaces. Following this evaluation, local authorities can implement (short, medium or long-term) solutions to improve public spaces and create new ones. NGO representatives and other stakeholders in civic society can do their best to set up their own offices and reception rooms (or other facilities they are using) as safe spaces, community spaces, where people can come, meet, socialise and spend time together not as consumers but as community members.

Stakeholders in active ageing, lifelong learning and civil society in general will have to develop the sensitivity to recognise the causes and processes that have 'driven' older men out of public life in the community. Opportunities have mostly been seen a) in already existing and diverse educational and training programmes; b) in informing and raising awareness about them for older men; and c) in considering alternative activities for older men in their later life (Gregorčič, 2017). In some contexts of the *Old Guys* team, there is no lack of activities adequate for older men. In other contexts, there is an abundance of (formal or non-formal) activities that attract more women than men. But it is a fact that there is a lack of information about these opportunities. Furthermore, institutions in the same areas often offer activities without knowing what the other institutions are doing. Civil society institutions and local authorities should, therefore, better articulate the opportunities for a more active life, and work on the dissemination of these activities. A good example of a coordinated way of informing the public, a platform, etc., can be found in the Portuguese 'Golden Age' programme – Programa Idade D'Ouro. To promote a variety of activities so that both men and women have opportunities seems crucial.

The research has shown that older men highly value the independence and autonomy that defined them in their working life. The specific obstacles that prevent older adults from having adequate access and mobility in local environments should be identified, as should the possibilities for cheaper or free services for older adults in the context of the decentralisation of services, which should be enabled by the national government with the cooperation of civic society and local authorities. Programmes on cognitive ageing, (men's) mental health promotion, etc. should be developed and broader public discussions should be organised on these persisting taboo themes. National governments need to introduce long-term measures to improve the healthcare system and services to provide equal access for all people (including older adults). Besides non-profitable innovations towards 'opening' institutions for older adults, community co-management should also be developed, practising de-institutionalisation and community work.

Additionally, local communities should develop more democratic and participatory processes for the involvement of older adults in consultation and other practices that would

enable them to contribute to the community. The personal approach has been shown to be the most effective – men being encouraged to participate or brought along to activities by their partners or friends. It's also important that they are addressed through 'activity', 'doing things', since (intergenerational or any other) cooperation can only be developed by 'doing' and not by 'spectating', as well as by various institutions and especially by NGOs and organisations focused on older adults. Our research outlined the pricelessness and importance of a wife/partner for older men in this life stage. This is why wives (or life partners) can probably be the most important target group to encourage their male partners to participate in community or learning activities, and those who will benefit most from men's engagement with community work, doings and learning.

In the framework of national strategies and the preparation of action plans by various ministries, local and national authorities should support the implementation of legislation that tackles the financial and material vulnerability of older people and those at high risk of poverty. Educational background seems central to quality of life in adulthood and, more specifically, in old age. Lifelong learning programmes provided by educational institutions and (informal) learning programmes should tackle these complex problems not only with educational means, but also with community activities and programmes not necessarily dealing with education, but with greater focus on socialising, mutuality and community (with intergenerational programmes and exchange, creativity, etc.).

Sensibility for gender capital should be developed within organisations dealing with older adults as well as sensibility for the very understanding of the heterogeneity of older adults. Gender should be recognised as plural, relational, multidimensional, and deeply contextual (Johnson & Repta, 2012), while the heterogeneity of diverse needs, possibilities, capabilities, interests, lifestyles, motivations, experiencing ageing, dealing with ageing, (gender-related) health issues and risks, etc. should be observed. Hegemonic measures can leave many men, particularly those who are disadvantaged and unemployed or who are older, marginalised, under resourced and impact negatively on their mental and physical health status (Foley, 2018, pp. 30-31). Therefore, hegemonic masculinities should be disclosed through public discussion, through education and learning, health promotion and other community programmes – with the consciousness that this issue concerns all generations and all genders.

To go beyond age-segregated communities, older adults should establish more permanent, comprehensive and intergenerational systems of mutual and other forms of assistance in the community, for which intergenerational common spaces should be developed – for exchange, interaction, gathering. Cultural institutions in this regard often represent an important common place if they are open to the community. Institutions of various natures that organise activities for older adults should be aware that the participation of women and men is driven by different factors (and should understand those factors). Activities that are friendly to men and women should exist and social spaces familiar to women and/or men should be nurtured and encouraged. The key is not in organising men-only activities but in the diversity of learning opportunities so that men and women

can choose the ones they like the most. If a men-only activity is suggested or developed by older men themselves, it should be recognised, valued, supported and accepted with the recognition of a clear need for men's spaces, men's activities, and men's socialisation that can empower older men in their later life.

The evaluation of education and learning opportunities available to older adults should be done in the context of municipalities, considering the possibilities of all institutions and making better use of existing resources. New activities or new institutions should be created only after a global evaluation of the resources/education on offer, taking into consideration the needs of the older population. Male-oriented community programmes have the potential to help men maintain meaningful connections to the activities and roles that they developed throughout their lifetime. They proved to be important for their identity, wellbeing and mental health. The Men's Shed movement as one of the most recognised practices of male-oriented community programmes and its achievements should be widely promoted and (financially) supported.

More generally, local communities should develop more democratic and participatory processes for the involvement of older adults in consultation and other practices that would enable them to contribute to the community and would not need to happen separately or be segregated from the rest of society. Institutions of various natures, worried about the well-being and quality of life of older adults, should build stronger and wider partnerships, including the security and health services.

CONCLUSION

The aim of this project was to introduce community workers and NGO stakeholders to strategies on how to improve the participation of men aged 60 years or more in the local community and, in particular, how to encourage men's socialisation, informal learning, inclusion and engagement in organisations which are not primarily meant for education and learning in the third and fourth life stages. Therefore, all materials prepared by the project partners suggest how to develop bottom-up strategies for community activities targeting older adults and direction for networking community organisations. Besides this, the project tries to raise public awareness of the social isolation of men aged 60 years or more; build the capacity of national and local institutions/organisations to address the (self-)marginalisation and poor health of older men through social innovations and alternative approaches fostering community learning, doing and socialising.

However, all the project partners faced huge obstacles that cannot be resolved with lifelong learning and active ageing strategies or policies. The financial and material vulnerability of older adults, the high risk of poverty, spatial exclusion, unequal access to health and other institutions, mobility, the need for labour, the social and political participation of older adults (also men aged 60 years or more), among others, are problems that go far beyond the scope of civil society and NGOs dealing with older adults. They should be solved by central government and national policy, in some part also by

local authorities. But as presented in this article, particularly the suggestions and recommendations in the last section, there are also numerous obstacles that can be solved by civil society and by NGOs. Innovative, more democratic, participative, informal and bottom-up approaches are needed, ones able to consider and re-arrange their spaces, programmes and attitudes towards older adults and consider gendered needs, problems and experiences.

Despite the fact that our project specifically addressed the participation of men aged 60 years or more in the community, some issues and recommendations from this article apply to all genders and in some cases even more to women than to men (e.g. the material deprivation of women vs. men in all countries observed). The purpose of the project was not to exclude women but to research in-depth the local gender-specific issues connected to ageing and shed a light on a group which has so far not been regarded as marginalised or deprived except in very few countries (Australia, Canada, Ireland). Equally, the main findings and recommendations from our research study do not propose men-only activities or segregated spaces for men. In fact, interviewees from all partner countries suggested the opposite: that the existent spaces, programmes of learning, action, and creation and meetings of older adults be connected, contextualised (in terms of space, content, activity, openness), and entwined in a community of intergenerational cooperation, where older adults will feel welcome, accepted, needed, respected and equal, and where they will be able to create and make things that they enjoy (including working with their hands and physical work). They might simply hang out and do nothing, as freely as free people do, and belong to the community as old guys, not as consumers or somebody who has to be thought about something by a younger professional in a classroom.

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TRANSITIONS TO RETIREMENT: PERCEPTIONS OF PORTUGUESE OLDER MEN

ABSTRACT

In this paper we present results based on the project Old Guys Say Yes to Community. We interviewed 90 men in southern Portugal between 60 and 93 years of age. Our main aim was to understand how older men experienced their transitions from work to retirement. We clarify the concept of transition and the models that explain transitions in the life course perspective. There are a number of factors to consider during the processes of retirement. Also, not much is known about the role of education and learning during the transition process. We try to contribute to the field, reflecting on the learning processes that result from this transition. Our findings show that work is one of the most crucial dimensions to consider in transitions to retirement (despite the fact that we identify many others). But education and learning do have an immense impact on the lives of older adults, either negative or positive.

Keywords: *transition, transition to retirement, men, education and learning*

PREHODI V UPOKOJITEV: DOJEMANJE STAREJŠIH MOŠKIH NA PORTUGALSKEM – POVZETEK

V članku predstavljamo rezultate raziskave Vključevanje moških, starih 60 let ali več, v skupnost. Intervjuvali samo 90 moških z juga Portugalske, starih od 60 do 93 let. Naš glavni cilj je bil razumeti, kako starejši moški doživljajo svoj prehod iz zaposlitve v upokožitev. Ob tem pojasnimo koncept prehoda in modele, ki razlagajo prehode z vidika različnih življenjskih obdobj. Na proces upokoževanja vplivajo številni dejavniki, ki jih je treba upoštevati. Prav tako ni veliko znanega o vlogi izobraževanja in učenja med procesom prehoda. S člankom poskušamo prispevati k osvetlitvi področja s proučevanjem učnih procesov, ki izhajajo iz tega prehoda. Naše ugotovitve kažejo, da je delo ena ključnih dimenzij pri prehodu v upokožitev (čeprav smo prepoznali tudi številne druge). Kljub temu pa imata izobraževanje in učenje ogromen vpliv na življenje starejših odraslih, bodisi v negativnem bodisi v pozitivnem smislu.

Ključne besede: *prehod, prehod v upokožitev, moški, izobraževanje in učenje*

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INTRODUCTION

In the past decades, we have observed major demographic transformations in most European countries in terms of population ageing, with increasing life expectancy and the consequent changes in the later phase of life (Schmidt-Hertha & Rees, 2017). In Portugal, for instance, the ageing index has increased from 98.8 in 2000 to 153.2 in 2017, being one of the highest in the EU (European Commission, 2018), and it is expected to increase further in the decades to come (European Commission, 2015). Projections of the elderly population established in 2015 predict that in 2060, 34.6% of the Portuguese population will be 65 or older, with almost half of the older adults (46.5%) being 80 years old or more (European Commission – Directorate-General for Economic and Financial Affairs, 2015). This scenario has led to increasing concern about the challenges posed by ageing, especially when we talk about transitions in late life.

According to Grenier (2012), the concept of transition became a central one in the late 1970s and early 1980s, but its use is not always clear, and it can be applied to multiple contexts. On the other hand, the concept of transition has evolved in complexity over the last few decades because of a multiplicity of motives (Fragoso et al., 2013). For example, it is arguable that a traditional, linear biography still exists. The course of contemporary life seems to have become more complex and has lost its former stable contours (Alheit, 1995). Consequently, in this paper, we will first try to clarify the concept of transition and the ones related to it, reflecting on the models that explain transitions in the life course perspective, with a particular focus on retirement. After all, retirement is considered to be a major life transition associated in public discourses with reduced economic productivity and a range of personal irregularities (Moffatt & Heaven, 2017).

We will see below that a number of factors influence transitions to retirement. Gender is one of them and it is safe to state that transitions to retirement may differ considerably between men and women (Duberley, Carmichael, & Szmigin, 2014; Tams & Arthur, 2010). In our case, we will only analyse men. This article results from an investigation carried out as part of the project *Old Guys Say Yes to Community*¹. As a part of this study, 90 men were interviewed in southern Portugal between 60 and 93 years of age, from quite diverse contexts, social classes and cultural environments. Whilst the project aims to better understand the non-formal and informal learning of men in community settings, in this article, we will focus on the older men's transitions to retirement. Our main aim is to understand how these men experienced their transitions from work to retirement. Understanding transitions in late life includes comprehending the changing context of 'growing old' (characterised by demographic change and cultural transformation) and the importance of subjective interpretations of ageing (Grenier, 2012).

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CONCEPTUAL DIFFERENCES IN TRANSITIONS: KEY CONCEPTS

To understand transitions in life, we must refer to Erikson (1959) and Levinson (1986), who conceived *the life cycle* in the context of social and developmental psychology. In this context, *transition* refers to models that describe different stages of maturation and development. The life cycle suggests continuity and regeneration, and has been applied to social and developmental models, although it represents restrictions according to stages (Grenier, 2012). The life cycle is among the most widely used concepts in social sciences: it may be claimed just to indicate temporality; it may be applied to initiate an analysis; or it may refer to the assumptions of research in developmental processes (O’Rand & Kreeker, 1990). Rigorously defined, the concept refers to maturational and generational processes in natural populations.

The concept of *life span*, also used primarily in psychology, shapes the nature and timing of developmental tasks. In this sense, it is used mostly to refer to psychological development and is, therefore, quite limited when we are dealing with discussions about transition (Grenier, 2012).

In the 1960s, some sociologists claimed that patterns and stages of human development are not as universal as previously claimed (Cain, 1964, cit. in Hendricks, 2012). In their opinion, we cannot assume that life is comprised of fixed stages that inevitably and invariably explain everything that happens in the process. Also, people do not develop or grow old isolated from the conditions in which they are grounded (Riegel, 1975). This was the context of the appearance of the initial round of life course explanations. Sociologists, among others, formulated an alternative paradigm of life course analyses that emphasised cultural factors, social circumstances, and social interactions as essential to understanding the life course (Hendricks, 2012).

The concept of *life course* is usually used to refer to an overall trajectory across the entire period of someone’s life (Clausen, 1986; Elder, Johnson, & Crosnoe, 2003). Established in the sociological perspective, this term is intended to capture the fluid and changing aspects of experience. Many approaches to the study of transitions and ageing claim to be attached to the life course, a concept that has become fundamental to the study of continuity, change and transition (Grenier, 2012). This is the broadest concept and can be used to represent a fluid pathway, one where changes and development are possible. It can be applied to place older people’s experiences over the duration of a lifetime and this is why this concept provides the frame required in this paper to understand continuity and change in the transition to late life (Grenier, 2012; Hendricks, 2012).

Finally, the term *late life* is a more recent addition to the research of ageing and transition. Embedded in the life course perspective, this concept draws attention to the later parts of the life course. According to Grenier (2012), it refers to a large, quite unspecified period of life that characterises ‘growing old’. In the past few years, it has been used in a variety of ways: to refer to people aged 50; older people as defined in terms of social benefits eligibility at 65+; and people in the ‘fourth age’.

Recent research has demonstrated that the limits and expectations of transitions throughout the life course and in late life are changing. In the context of gerontology and policy, transitions tend to be associated with relatively fixed social roles, aged-based or social stages, or even marked by types of experiences (Grenier, 2012). It is thus quite common to understand transitions in the context of stages of development, with childhood, middle age and late life describing the expected stages and roles defined in relation to family, work, and society.

The models used to explain transitions most are assumed to be generic and fixed across the life course (Schlossberg, Waters, & Goodman, 1995). Models that do address adult ageing tend to focus on specific types of transitions occurring in quite distinct stages, such as retirement, grandparenthood or widowhood (e.g. Levinson & Darrow, 1978; Erikson, 1982; Levinson, 1986). In this paper, we will focus on the life stages of pre-retirement and retirement but take into account that a number of factors that happen during other life stages have important meanings for most individuals.

FROM WORKING LIFE TO RETIREMENT

Research over the past few years has indicated that moving into retirement is a major life transition, frequently conceptualised as a critical event that can affect the future in significant ways (Kim & Moen, 2002). From a life course perspective, retirement is seen as the transition from adulthood to older age, but the idea of a tripartite standard life course has been challenged (Schmidt-Hertha & Rees, 2017). To Szinovacz (2003), for example, retirement features multiple dimensions and can refer to an institution, a process, or an experience. As an institution, the term refers to social structures that regulate the abandonment of the labour market; as a process, it concerns decisions and patterns of the withdrawal and is considered a more individualised experience in terms of the age in which it occurs, the form it takes (gradual, voluntary, early) and the growing difficulties associated with it (Phillipson, 2004); as an experience, it refers to the multiple life changes that result from this process (Duberley, Carmichael, & Szmigin, 2014).

In this sense, retirement is no longer a single event that marks the end of paid employment (Wang & Shultz, 2010) but a process that changes in timing and duration (Marshall, Clarke, & Ballantyne, 2001). Over the past few years, the transition from working life to retirement has changed significantly in most European countries, with new perspectives being discussed and considered in terms of the different pathways to retirement. Quite recently, authors such as Künemund and Hahmann (2014) have talked about a change from the idea of a traditional model of a life course that considers three phases (learning in childhood and youth, working in adulthood, and resting in later life), to more flexible models that consider mixed phases of working, learning and resting.

Thus, retirement implicates adapting to changes in life contexts, and these changes can go on for various periods of time. Even if desired, it can be more difficult than initially perceived (Fonseca, 2012), although there is not a consensus regarding the impact of

retirement (Kim & Moen, 2002). Different perceptions of retirement implicate different adaptive responses to the changing situations, exposing people to different states of vulnerability that interfere in an active ageing (Loureiro et al., 2015).

Work is a central dimension of our lives that functions as a powerful organiser of the remaining life dimensions. Identity and social adjustments are built according to work, which influences the building of various social representations of ageing (Vicente, 2007). Work also allows the conquest of a certain social status, feelings of autonomy and control. Work-life relations determine the course of the year (holidays), the organisation of the week (weekend, workdays), as well as of the day (working hours, time for family, leisure time) (Schmidt-Hertha & Rees, 2017). Going to work every day provides a routine and a structure, making people feel that they are a part of society. It is only natural that work and career status are key factors when we talk about identity development and this is mostly because people define themselves and live accordingly with their professions and their jobs (Schmidt-Hertha & Rees, 2017). Consequently, leaving the labour market can be a negative experience with significant consequences in terms of physical and psychological health, as well as social capital. In this sense, the transition to retirement may be difficult, in particular for people who perceive work to be an important part of their identity. Losing these structures can have a negative impact when it comes to people's feelings.

Another aspect refers to the importance of the workplace: it usually offers social inclusion by making individuals part of a team, sharing years and hours of the day with the same colleagues. For some adults, leaving work may at least imply the risk of losing social relationships, with the consequent shrinking of their social networks. Nevertheless, the transition to retirement can also be experienced as a relief when it means getting rid of obligations and stressful work (Reeuwijk et al., 2013), or limitations on personal freedom. When this happens, leaving work provides the possibility to embrace new opportunities to follow personal interests. In current European societies many people engage in voluntary activities, travel, or grandparenting – usually activities that promote psychological well-being.

Transitions to retirement can be navigated with greater success if older adults put some effort into planning their retirement phase. Preparation for retirement is therefore an important issue within transitions to retirement. Wang and Shultz (2010) consider that the process that leads to retirement begins with informal planning that progresses, with time, to more deliberate and formal planning. In fact, there is a significant variability in the degree to which individuals actively plan for retirement. Two models of in-between phases in transition from work to retirement have been considered in the literature: *bridge employment* (part-time work before retirement) and *re-careering* (second career after legal retirement) (Boveda & Metz, 2016).

The term *bridge employment* has been used to describe transitional work that occurs between full-time employment in a career and complete labour force withdrawal (Wang, Zang, Liu & Schultz, 2008). It can take many forms (e.g. part-time, temporary, seasonal),

is typically of short duration (Feldman, 1994), and is more frequent among those with higher education (Wang et al., 2008). Re-careering or an encore career is considered a new phase of work after departure from career development. According to Feldman (2011), an encore career is personal and characterised by a purpose, passion and personal fulfilment. It was also found that women more frequently choose bridge employment, while men are more likely to embrace a re-careering situation. In fact, the transition to retirement may differ considerably between men and women, as well as their occupational pathways and careers, and their perception of this transition (Duberley, Carmichael, & Szmigin, 2014; Tams & Arthur, 2010).

Gender is, therefore, an important factor to consider in transitions to retirement. But health seems to be determinant in this context, and good health predicts working beyond retirement. On the other hand, a poor state of health may force workers to retire before their time. The financial capacity of people is central, both in terms of the decision to retire and the way individuals navigate transitions to retirement. Hence it is not strange that older workers with low incomes continue to work beyond retirement (De Wind et al., 2016).

There are a number of factors to consider during the processes of retirement. Attitudes towards retirement may play an important role, but so can financial constraints, the family context, and other individual obligations, as well as state or employer policies (Schmidt-Hertha & Rees, 2017). Also, not much is known about the role of education and learning during the transition process or about the way adults make use of educational compromises to project their transition to retirement. Schmidt-Hertha and Rees (2017) find that in what concerns the learning processes that result from this transition, research is quite inexistent. In this study, we try to contribute to the field by reflecting on this aspect.

METHODS

This paper seeks to contribute to a deeper understanding of transitions to retirement in older men. We chose a qualitative study since it is the most well-suited approach when we seek to understand people's experiences from their point of view. As Schwandt (2001) states: "Qualitative inquiry deals with human lived experience. It is the life-world as it is lived, felt, undergone, made sense of, and accomplished by human beings that is the object of study" (p. 84).

Semi-structured interviews were conducted with 90 men who agreed to voluntarily participate. The participants were recruited from day care centres, third age universities, welfare institutions, through references, and by encouraging snowballing. The participants' ages range from 60 to 93 and they live in rural (S. Brás de Alportel) and urban areas (Faro and Olhão) of the Algarve. The criteria for participation required that they were not institutionalised (in residential homes, for example) and aged 60 years old or more. The participant sample is diverse in terms of work situation (retired, active, unemployed), educational background, income, marital status (single, married or cohabiting, divorced, and

widowed), and level of activity in civil society organisations (the type of role and level of participation in these organisations).

The interviews included questions concerning childhood (family background, schooling), working life, the transition to retirement and the current situation (health status, financial situation, family and social networks). Most interviews took place in the participants' residences. However, some were conducted in private spaces in the institutions of the civil society through which the participants were contacted.

Qualitative content analysis (QCA), as described by Schreier (2012), was used in order to analyse the data. Since it allows the defining of categories through an inductive procedure, that is, as emerging from the data, it seemed to be an appropriate method to capture the participants' experiences of the transition into retirement.

Given the diversity of the older adults involved and their specific situations, we separated the men into different groups using education level and rural or urban context of life as the criteria. We defined three groups (with approximately 30 participants each): 1) men from urban areas with a very low level of education (four years of schooling or less); 2) men from rural areas with a low/medium level of education (most with nine years of schooling, but some with secondary level schooling); and 3) men from urban areas with a medium/high level of education (some with nine to twelve years of schooling, some with a tertiary education degree).

We then created a coding frame for each group, inductively, in a data-driven way. This means that the interview transcripts were read in order to understand how the older men experienced their transitions from work to retirement. This procedure allowed us not only to discover similar patterns within each of the groups, but also that the patterns were different when we compared the groups between each other.

FINDINGS

Men from urban areas with a very low educational background

This group includes men with four years or less of schooling, and some of them are illiterate. They have a working history as non-qualified or manual workers, and most of them have a history of changing from one non-qualified job to the next, therefore with high levels of professional instability. A significant number of these men worked in the informal economy at least for parts of their lives, which has even further decreased their pensions, calculated on the basis of the numbers of years of contribution to the tax system.

These men have a very low financial capital that is revealed by their possessions: it is very rare that we find someone in this group possessing a driver's license and none has a car. Not all have a TV. None has used computers or other digital devices apart from a mobile phone. Still, not all possess a mobile phone and the ones who do make a basic use of it.

We found some men in this group who did not have a place to stay. Most of these men, therefore, live in very precarious conditions or even in poverty. Some of them do not even have enough to eat: they are dependent on the assistance of day care centres or similar institutions to get two meals a day.

These men's transitions to retirement were generally problematic, and this was due to multiple causes. First, some of them need to work even after retirement, simply because they need it to survive: some of the pensions they receive are below 200€, in a country where the minimum wage is about 580€ and renting a very small flat in a peripheral area costs at least 300€/month. But the majority of those who retire still have low financial capital due to a professional life of low salaries with no possibility of saving money or face the inevitable loss of income after retirement. Only a minority of these men have financial support from their families. Their low financial capital (which is primarily caused by a very low educational background) has a direct influence on at least two other life dimensions crucial to successfully navigating the transition to retirement: health status and sociability.

Although the national health system is basically free, some medical areas of expertise take time to access and a number of complementary diagnosis methods take time too. To be totally dependent on the public system of health can thus be problematic. Additionally, these men cannot afford the consequences of a severe health problem. If it happens, it is almost certain that their situation turns significantly worse. Health problems can be the cause of a forced early retirement or cause a deficiency. The former and the later further increase their poverty. Health problems can also dramatically reduce the men's mobility and constrain their ability to socialise. The fact that there are still important obstacles to mobility in most public spaces does not help. Just to give an extreme example, we interviewed a man who had not left his own small apartment for about two years because he was in a wheelchair and could not go out without assistance.

Socialisation in the public spaces of a city – marketplaces, parks, small neighbourhood cafés, etc. – is very important to these men because it means a basic connection to their friends and community events. These men are dependent on spaces to socialise because they do not use electronic forms of communication at all. However, some factors negatively impact their ability to socialise: health problems, reduced mobility or deficiency, and very low social capital (some men cannot even afford a cup of coffee and their shame excludes them from that option).

Social networks are therefore important in transitions to retirement. These men's social networks tend to be small in dimension and very unsatisfying. It is true that some have families, but others do not meet family members regularly: João, for example, does not even know where his two nephews live and the only contact with his sister happens when she takes him to the medical centre. Their contact with neighbours tends to be 'civilised' but not deep, and their number of friends is decreasing. Loneliness is a serious problem that affects most of the men in this group, usually deepened if they are widowers. For a

small number of men, the death of their wives was a traumatic event that left profound psychological marks (depression or even suicidal thoughts).

It seems natural that education or learning (other than informal learning, at least) play no part in the transitions to retirement of these men. Their patterns of activity include little intellectual activity and no participation at all in structured learning, and no physical activity except if their occupations require it. Socialising, usually in public spaces in the community, is the one more noticeable activity they keep.

The conjunction of all these factors leads the majority of the men of this group to a terrible situation after retirement, marked by poverty and very low expectations towards life itself. Nevertheless, not all the men we interviewed have experienced difficult transitions to retirement and not all of them live in a terrible situation. A minority maintain professional activity (even if this shows a simple financial need), and this is central in their lives. They use public spaces for socialisation purposes and play games with their friends (cards, dominos, etc.). In some cases, we can see that support coming from social networks does make a difference, not only in the way these men subjectively perceive retirement, but in their objective (also financial) situation as well (friends, family, and ex-employers have made a difference in some cases).

Men from rural areas with a low/medium educational background

This group includes some illiterate men, some with a basic level of education and only a few with secondary education. Their geographical space is determinant in various ways. They live in a semi-mountainous context that is characterised by strong isolation and fragmentation. Most live in small places with a reduced number of neighbours and all services are some kilometres away and are only accessible by car because public transportation is scarce. Most of these men were or are subsistence farmers, while others were manual workers. There are a few who performed technical jobs and a high percentage of them worked for the city hall – a main employer in these areas. Only a minority use computers but all of them use mobile phones.

Formally speaking, the meanings of transitions to retirement are very relative among the men in this group. Either they are farmers, and hence never really retire (even if that is the case formally, they keep a daily routine of working in the fields much similar to their usual patterns of activity), or when retired they found something to do in small farming places. So, the main activity they retain is physical (farming and related activities in the rural world), but no learning activity at all. Socialisation is generally a problem due to geographic isolation. They would like to be in closer contact with their families, but their sons and daughters have usually moved away to urban centres or other European countries. They can be in daily contact with neighbours, but conflicts with neighbours can lead to strong isolation. It is only natural that their social networks are small in dimension and not rewarding or even problematic. There are also very few or no cultural opportunities. Socialisation opportunities can be kilometres away and mobility is a barrier. These men consider their main problems to be health

and access to public health, lack of places to socialise, lack of cultural events and loneliness.

Similarly to what happened in the first group, education and learning also play a minor or non-existing role among these men. There is a very low level of participation in activities to do with learning or learning associations, partially motivated by their (local) inexistence and difficulties in transport or mobility.

Their sense of belonging to the community and identity are strong and based in the general notion that, culturally, the mountainous areas are different from the coastal cities. But a certain type of despair makes up a part of this identity: they believe that there is no future in these areas – almost a human desert today.

So, the geographical and social situation of the population leads us to state that transition to retirement is, in this context, a concept that loses a significant part of its explanatory or even functional functions. The men included in this group are in a difficult situation and find themselves, after retirement (and they do retire), isolated and alone, far away from easy access to public health services.

Men from urban areas with a medium/high educational background

This group includes older men that spent a minimum of nine to 12 years in school and some of them have a higher education degree. It is important to note that 40–50 years ago nine years of schooling was not a low educational level in Portugal; quite the contrary, this was more than enough to allow easy access to employment. It is therefore natural that the men of this group have a wide range of professions, most of them marked by high salaries and even high social status. Their professional trajectories carry significant financial capital as well as higher social, cultural and symbolic capital. These types of capital were crucial during the professional trajectories of these men as facilitators of employment, change or progress in their careers, and to ease access to political functions in local administration.

Most of the men in this group possess a car and drive frequently. The great majority have computers and uses social networks, email and internet (in some cases daily). All of them have mobile phones and use a considerable number of applications. We can summarise by saying they live comfortably in material terms and have no serious problems with mobility.

The men of this group generally performed successful transitions to retirement. This does not mean there were no obstacles at all during the transition; quite the contrary, most of these men had a very active life in professional terms and preparation to transition was mostly absent. The first impacts were hard for a number of them. For example, António, who was a higher education lecturer, stated that the liberty of being able to choose what to do or the freedom from daily professional obligations felt good only for the first few months. After this initial period, it was necessary to find new challenges. Even today, he misses the daily contact with students, as friends of lower age groups are difficult to make now.

Other men had difficulties of some kind during the transition to retirement or after an initial period when everything seemed wonderful. However, a set of factors helped them to face these changes or problems and achieve a better situation. First, considerable financial capital is of utmost importance and is a basic condition that has a positive effect on various dimensions (access to goods and services, a more comfortable life in material terms, a buffer if health problems arise, the ability to travel to other countries, etc.). Some of these men are capable, for example, to help members of their families in financial terms, providing better health care if needed. In short, they have enough financial capital to be able to react adequately to unpredictable events, and to provide financial help to their families if needed.

Second, social networks tend to be bigger and more satisfying, with increased opportunities both to give and to receive social support. To almost all of them family is fundamental and they meet frequently with sisters and brothers, daughters and sons; and the majority have an active role in socialising or helping in the education of grandsons and granddaughters. Globally, they maintain friends from their professional milieus and arrange frequent meetings with them either daily in coffee shops or weekly for lunch, for example. The majority of these men are very active in (or lead, in some cases) local associations, sports clubs, amateur theatre groups, cultural associations, or similar projects. These are, in most cases, long-lasting activities that were once fundamental to the cultural life of the cities of Faro and Olhão; they provide a source of rich and deep socialisation that men use as an important resource after retirement. These men are active members of the community and contribute daily to community life in various roles.

Third, within this group we can see that learning has a very important role, especially *informal learning* (not considering the fact that their educational background was the main factor that yielded high financial capital and a rewarding career). After retirement, these men have kept a very interesting pattern of activities in various dimensions: they are active physically; walking is an interest of the broad majority (with or without a dog/company). Collectively, they have a wide range of cultural interests: reading, the cinema, the theatre (some belong to theatre groups), singing, learning at universities of the third age, or cultural performances of different kinds. A significant part has hobbies of some kind. Some are volunteers (for example, two teach at third age universities). In addition, the majority not only had the habit of travelling, but have also kept up that habit after retirement, although with slight changes (for example, these days they prefer fully-organised trips). To summarise, most men have been able to maintain their activities after retirement and a significant number have been able to pursue new interests. But informal learning is, globally, a very important dimension of their lives, for most of them in an explicit way.

When asked about the most common problems that affect older adults, the men answer as if they are *not talking about themselves*, but about others, which is meaningful. Most of them point out common problems, such as loneliness, apathy, mobility and physical obstacles to mobility, etc. Interestingly, the men think there is a wide range of available educational, physical and cultural activities that older adults could benefit from. The problem

is not, thus, the shortage of supply. They also point out that contact with younger people is crucial and enthusiastically defend inter-generational learning (even if the meanings they give to inter-generational learning differ).

CONCLUSIONS

The men we interviewed show three very different contextual situations that have a basic impact over the life course and, consequently, on the way they experience the transitions to retirement and achieve – or not – a good current situation. This first comment reminds us of a very important conclusion when studying transitions to retirement: we should understand not only the specific period of people’s predictable transitions but also the wider conditions of their lives. Without the knowledge of the educational background of our interviewees, the types of occupations they had over time, or the way they live or contribute to community culture, our results would be considerably different, or maybe even biased. The life course perspective therefore has a number of advantages. Our results show how important this perspective is for capturing people’s experiences, and the life changes occurring along the process (Duberley, Carmichael, & Szmigin, 2014).

From our findings it seems clear that work is one of the most crucial dimensions one must analyse when dealing with transitions to retirement. Non-qualified, low-paid work marked the lives and therefore severely constrained the retirement of the men in our first group. Rural subsistence work marked the lives of the men living in the inland parts of our region in such a way that it is still a dominant category in their lives today – and will probably be until they die. High-status, well-paid jobs conveyed a high financial capital to the men included in our third group in such a way that other dimensions of their lives were positively affected. There is no doubt that work, identity and social adjustments are strongly connected (Vicente, 2007). Work influences autonomy and control over our lives (Schmidt-Hertha & Rees, 2017) and this is crucial while examining transitions to retirement. Our results also show (particularly among the men in the third group) that getting rid of professional obligations can indeed be experienced as a relief, as stated by Reeuwijk et al. (2013). But for some men this lasts only for some time. These experiences remind us of Atcheley’s (1976) pioneer work on the typical phases of living retirement and the transitions to retirement. In the author’s terms, the feelings of relief would match the *honey-moon* phase, and the awareness that this is not enough corresponds to Atcheley’s phase of *disenchantment*. Of course, the diversity of our data also shows very clearly that a sequential phasing, equal for all, such as that suggested by Atcheley at the time, cannot adequately describe the complexity of modern biographies, each time less linear and more complex.

The most original contribution of our article, however, lies in our findings regarding education and learning. There are two major conclusions to stress on this issue. First, educational background is, in our case, the most basic explanatory factor regarding a successful transition to retirement and the achievement of a stable post-retirement situation. The

educational level of the men deeply influences their access to employment, and further the quality and status of employment as well as the financial and cultural capital associated with it. Over decades, these factors tend to interact and when reaching an older age, this effect is more visible than ever. The results concerning groups one and three show this very clearly. Second, learning and, most specifically, informal learning, can be very important for the way people experience the transition to retirement and achieve post-retirement stability with a good quality of life. For example, many men in group three find a crucial environment in cultural activities or participating in clubs and cultural associations after retirement. But the great majority of activities they participate in are not formal or even non-formal. The men from our third group made this very visible, as informal learning assumed a central, positive role in their lives. In other words, informal learning can be an important instrument for changing community life (McGivney, 1999). We also note that informal learning is often invisible, unnoticed by both researchers and educators. Our findings tell us we should reverse this situation.

As well as the implications, the limitations of this study must also be considered. Because this study only reports men's perceptions, no comparative analysis is possible with the women's context, even if this was not the purpose. Additionally, our research was developed in a particular region, and we have no guarantee that it can explain the national reality.

Nevertheless, the use of a life course approach has advantages and did contribute to the knowledge of educational background, occupations, people's previous lives, etc. The results do seem to have an impact in local and regional policies and the participants' quality of life when we refer to orientations concerning transitions and the preparation to retirement. Knowing the role of work, education and learning in the process, transitions to retirement can be easier and changes are possible in the community context.

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Małgorzata Malec-Rawiński

OLDER MEN'S BIOGRAPHICAL LEARNING AND MASCULINITY

ABSTRACT

The general aim of this paper is to present insights from a Polish case study on the learning experiences of Polish older men. The research data was collected by means of 'guided', semi-structured interviews. This paper presents two well-educated older men's life stories from two different local communities in Poland and the analyses of their life experiences in the context of masculinities and ageing using a biographical learning approach. The analyses of the two biographical narratives have shown the diversity in the life histories of older men, but also similar struggles and challenges. They have illustrated how older men cannot simply be reduced to their experience of ageing, but that they also carry some continuously (re)negotiated struggles with masculinity, weaving new and rich threads for learning that is lifelong and life-wide.

Keywords: *biographical learning, masculinity, ageing, older men, life experiences*

BIOGRAFSKO UČENJE IN MOŠKOST PRI STAREJŠIH MOŠKIH – POVZETEK

Namen prispevka je predstaviti poljsko študijo primerov o izkušnjah učenja starejših Poljakov. Podatki so bili zbrani s pomočjo delno strukturiranih vodenih intervjujev. Prispevek se osredotoča na življenjski zgodbi dveh izobraženih starejših moških iz različnih lokalnih skupnosti na Poljskem in analizi njunih življenjskih izkušenj v okviru moškosti in staranja z uporabo pristopa biografskega učenja. Analizi obeh biografskih pripovedi sta pokazali na raznolikost življenjskih zgodovin starejših moških, hkrati pa tudi na soočanje s podobnimi napori in izzivi. Pripovedi sta ponazorili, da starejših moških ne moremo preprosto enačiti z njihovo izkušnjo staranja, ampak da nosijo tudi nekaj stalnega (pre)pogajanja z moškostjo ter spletajo nove in bogate niti tako za vseživljenjsko kot večrazsežnostno učenje.

Ključne besede: *biografsko učenje, moškost, staranje, starejši moški, življenjske izkušnje*

INTRODUCTION

In European studies, the issue of masculinity attracts less attention than its counterpart, femininity. However, knowledge about men's learning (especially older men), well-being, activity or interests is presented in some publications. The few exceptions in Anglophone literature demonstrate the propensity for learning among older men to have a positive influence on their well-being, for example, the significant research on men's lives by the Harvard Study of Adult Development¹. This longitudinal research project of adult health and well-being, which began in 1938, has closely examined the lives of more than 700 men and in some cases their spouses (Vaillant, 2012). Other international research on men's informal learning has shown that informal learning – for example, Men's Sheds² – can have a significant, positive impact on their lives. In Australia, research has shown that enriching learning among older men can make a difference to several dimensions of their lives, positively affecting their well-being (Golding, 2011; 2015a; 2015b). Further research has demonstrated that “men tend to choose hands-on activities, more problem-oriented activities and practical involvement where they can talk ‘shoulder to shoulder’, rather than being involved in indoor settings where most of the activity is face to face” (Formosa, Fragoso, & Jelenc Krašovec, 2014, p. 24).

Fewer studies on the learning activities of older men exist in our case study area, Poland. In Poland, older men are less visible in formalised educational activities offered by organisations such as Universities of the Third Age and/or Senior Clubs. Researchers are relatively less interested in studying the participation of older men in learning activities. Men are typically more visible in political parties, sports clubs, local government authorities and circles of interest concerning sports, hunting, motoring or fishing. In villages, towns and cities, if older men are active at all, their activities tend to continue in line with skills they had already developed. Yet Men's Sheds have also been established in Poland, with one in each of the cities of Warsaw, Słupsk and Wrocław.

This article is based on the data collected as part of the Erasmus+ project *Old Guys Say Yes to Community* (KA2-AE-9/16)³. The project centred around cooperation for innovation and the exchange of good practices. Its aim was to foster the inclusion of older men, aged 60 years or more, and especially those with a low level of education, in learning and education activities with the view to positively affect their well-being, health, social life and to contribute to their re/upskilling. Each research partner interviewed a sample of 90 to 100 men in their respective communities.

1 The Harvard Study of Adult Development <https://www.adultdevelopmentstudy.org/>.

2 A huge social movement of Men's Sheds exists mostly in Australia and New Zealand; however, a similar movement is growing in some European countries as well, e.g. Ireland, England, Denmark, Sweden, Poland.

3 Research was conducted by four research partners from Slovenia, Estonia, Portugal and Poland (2016-2019).

The aim of this paper, then, is to present insights from the Polish case study on the learning experiences of Polish older men. I take a biographical learning perspective in considering how these men position the meaning of life from an ageing perspective and in the context of their masculinity. The research questions specific to this paper were: How do the older men's life experiences and their masculinity shape their biographical learning? What is important for older men from an individual and ageing perspective? What is the meaning of their lives? What is expected of 'being a man' from a biographical perspective?

MASCULINITIES IN THE CONTEXT OF AGEING

As we age, we become (more) invisible and even 'genderless'. Older adults often experience internal struggles about health, isolation, loneliness, lack of duties, money and sometimes about gender. Moreover, they are also often portrayed as 'the others', as unproductive and problematic for society. In general, women face more social and economic disadvantages than men in this ageing process. However, men are not always the clear 'winners' – quite often they suffer more ill-health than women (Cleaver, 2002) and there are some social, cultural and educational aspects that differ between the genders (Kogan, 2016).

It is also important to consider that ageing is not uniformly experienced across the spectrum of one gender – there is not one pattern of masculinity. As Connell (1995) has argued, the concept of masculinity or male dominance is played out or has been recognised in various ways, from hegemonic dominance to subordinate or less powerful configurations of masculine practices such as those of subordinate masculinities. There is not one pattern of masculinity. Hegemonic masculinity is represented by specific, idealised stereotypes about what it means to 'be a man', and it refers to male norms that are considered ideal and dominant over other forms of masculinity in a given place and time (Connell, 1995). In different cultures, the social positions of genders differ. Considering masculinity in the context of ageing, I argue that the pattern of older men's masculinity is as diverse as their life experiences and is connected with cultural, historical, educational and social background. Different generations have historically, socially and culturally specific gender identities shaped by changes in the relationships between men and women that affect the dynamic nature of gender (Calasanti, 2004). Thus, older women might be perceived differently to older men in some societies. For example, women often ask for help more frequently and seek care more often than men, and these actions increase their visibility in many social and educational forums. The higher quantum of scholarship on older women may come as a result of such activities.

In the case of Polish society, there are two overlapping paradigms of masculinities. The first, a traditional one, conceives of masculinities as dominating, aggressive and specialised. The second paradigm emerges from the postmodernist perspective, which maintains that the characteristics of the 'new/modern' man are cooperative rather than dominant and capable of expressing emotions and desires (Chmura-Rutkowska & Ostrouch, 2007).

Men whose characteristics fall outside these two paradigms include disabled, homosexual, transgender, and older men, including those with lower levels of formal education.

THE BIOGRAPHICAL APPROACH AS THE RESEARCH FRAMEWORK

Ageing is a significant resource through which individuals construct their biographical narratives across the life course, both in terms of the past, looking back from old age, and looking forward (Hockey & James, 2003). While we are ageing, we more often wonder: What is important in our lives? Who are we? What do we have? What are we longing for or missing? Undertaking life histories is one way to gain insight into the experiences of individuals. Yet such stories are never isolated products; in fact, there are close links between the story and other social, cultural and ideological contexts. ‘Life construction’, therefore, is generated between the twin poles of structure and subjectivity (Alheit, 2009) and is an ongoing forming process of a person’s life. In this research, I used the biographical approach (Alheit, 1995; 2009; Alheit & Dausien, 2002; Bron, 2000; 2007; Bron & West, 2000; Dominicé, 2000) to investigate older men’s life experiences and the ageing process in the context of masculinities. I adopted a learning perspective to better understand learning as a part of life that requires people to face a whole variety of different experiences. The biographical approach used here aligns closely with learning and is embedded within societal structures and cultural contexts of interpretation (Alheit & Dausien, 2002). It takes into account an individual life in its entirety, in all its phases, as a framework for potential learning. Referring to the concept of ‘unlived life’ (Alheit, 1995), by reflecting on their own biographies, individuals can: create new meanings for the processes of their lives; ascribe/imply meanings to events and experiences of the past, to ongoing events and experiences, as well as to ideas and dreams of the future (Malec-Rawiński, 2017). Alheit (1995) has used the term ‘biographicity’ to explain how adults construct and reconstruct their lives as a way to understand one’s own life construction.

Life course and ageing are like an unpredictable flow of a river (Hockey & James, 2003). Listening to older men’s life stories, we find “a strange combination of power and powerlessness, privilege and pain” (Kaufman, 1994, p. 144), happiness, love, illnesses and death as well. Such knowledge can help us understand the differences between men’s lives, their happiness, sense of power or powerlessness, their vulnerabilities, needs, desires, problems and struggles. Yet “not all individuals pass through the same set of stages” (Schuller, 1992, p. 19). In telling a life story, a person can reflect on their unique life, struggles, life crises, and can give their life meaning. This reflection can lead to reflexive learning, which might change people’s perspectives and thus have transformative capacities (Bron, 2007). The reflective learning process occurs in tandem with communication and interaction with others and in relation to the social and cultural context (Alheit, 2009).

The Polish team, researchers and students from the University of Wrocław, conducted 99 interviews with older men in selected municipalities in Poland: the municipality of Turek – Żuki, the Brzeg municipality, the Jędrzejów community, the Sobótka community, and

the Żmigród community. The different conditions and opportunities in each community created multiple options for initiatives offered to older men. The research data was collected by means of 'guided', semi-structured interviews. The interview format constructed by the team and adopted in the national case studies meant that there was consistency in the questions and also, if necessary, flexibility according to the local conditions. The interviews differed in length. Some of the participants told their life stories while others simply answered questions from guided interviews; some were well-educated men and the others had received a lower level of education. The sample represents a mixture of men with different social, educational and cultural backgrounds. What follows is the analyses of two well-educated older men's life stories.

ANALYSES OF TWO BIOGRAPHICAL NARRATIVES

In the following section, I present two biographical narratives from older men in two local communities in Poland: Sobótka (Lower Silesia) and Jędrzejów (in the central part of the country). First, I present Jan's and Mark's vignettes, followed by the analyses of their life experiences in the context of masculinities and ageing using a biographical learning approach. Finally, I present a discussion of the findings and the conclusions.

Jan's vignette

Jan is 72 years old and lives in the small local community of Sobótka in the Lower Silesia region, which is around 50 kilometres from Wrocław. He is a former primary school teacher (his educational background is in music) and used to work as a tutor with children and teenagers with special needs. He enjoyed his job but because he felt burnt out, he decided to take the advantage of earlier retirement after 30 years of work. However, when he retired, he continued to work but not in his profession. He used to work as a greengrocer, an insurance salesman, a pottery salesman and as a tiler. He considered these occupations as something new and as a challenge. He is proud of his two adult daughters, mostly because he contributed to their education. He is happy with his family even if he longs for grandchildren (he likes children very much). His wife's health is deteriorating, and this worries him a lot. Family is important to him, not just his immediate family but his brothers as well. He used to have a dog that helped him stay fit and active and gave structure to his everyday life. Since the dog has been gone, he has considered getting a new one. Music is his big passion. He has been interested in music his entire life. After his retirement he started to learn to play various instruments. He likes to play an instrument every day and this makes him happy. He used to lead a music band of men from his local community. Another of his hobbies is mountain climbing. He loves to hike in the mountains with a group of friends, who arrange mountain excursions every year. He is satisfied with his life.

Mark's vignette

Mark is 73 years old. He lives in the small local community of Jędrzejów where he settled after he completed his education in Poznań. He is a former academic teacher. He received

his PhD in Chemical Wood Technology at the Agricultural Academy in Poznań, where he held the position of lecturer. He was satisfied as an academic teacher and researcher. The students liked him and because of his research, he used to attend many conferences in Poland and abroad. He worked in this position until he was 60 years old (in Poland, it was possible to retire at 60 up until a few years ago). He is interested in astronomy and fascinated by ancient history; he reads a lot of books on both topics. Following his retirement, he discovered an interest in water towers that are now considered historical monuments. He has travelled around Poland taking pictures of them and even started to write short stories about the water towers. However, his wife said that this topic was “nothing of interest”, so he gave up his writing. He has a big family, a wife, four daughters and ten grandchildren. After he gave up his water tower project, he felt lost somehow. He did, however, realise how occupied his wife was by their grandchildren, so he began helping her with their care. Six years into his retirement he decided to ‘repair’ his budget: he found a job as a warden in a courthouse. He has also been interested in discovering his family’s roots and is writing a book on his family history. He has been diagnosed with cancer but doesn’t want to make a big issue out of it. He treats the cancer as ‘the tenant’ that gnaws at him bit by bit.

Analysis

For data analysis, a grounded theory approach was used (Glaser, 1992; 1995). Grounded theory requires a careful and discrete sequence of analysis: open coding, selective coding, discovery and naming categories (Glaser, 1992). The analyses of Jan’s and Mark’s life stories showed some similarities as well as differences in accordance with the biographical patchwork of their life experiences. The emergent themes were coded and named as the following categories: accepting ageing/life; following the goals of life; dealing with life crises; coping with retirement; struggling with being a man; enjoying hobbies and having pets; taking care of health; and building relationships (family/friends). After establishing these themes, I worked out how each theme was embodied in Jan’s and Mark’s life stories. As the coding progressed, some categories began to overlap or connect with each other, which led me to rationalise my initial list into four categories: accepting ageing/life and following life goals; dealing with life crises in the context of retirement; enjoying hobbies and having pets; and self-care and care for significant others.

ACCEPTING AGEING/LIFE – FOLLOWING THE GOALS OF LIFE

Both men reflected upon their lives and came to similar conclusions regarding the acceptance of life/ageing. Neither regretted their lives so far, either how they lived, accepting the past and the present, or the ageing process itself. As Jan said:

I was born in such times and did what I did, I did it honestly, for money, and as well as I could and... for me, old age is neither good nor bad, I know this is the one and only direction for everybody...

Similarly, Mark stated the following: “if I had the choice, I would live my life the same way, the only difference is that I would spend more time with my family”. From a biographical perspective and ageing as a learning process, Mark said:

I am an old man... my life is almost over but I have had some experience of good and bad. I rarely met bad people; most people are good and nice. I am seeing things from the perspective of an old man.

Mark's comments are emblematic of the fact that when we are young, we do not think about the process of ageing that is already underway. In that vein, Jan also commented: “everyone is young but if she/he grows older, it is uncertain”. Both Mark and Jan share advice for a good life, one that could enhance learning to enrich life and accept the ageing process. Mark said: “after years I have discovered that people should practice living with a sense of humour... it should be a skill to break the everyday tensions”. Jan stated: “in every stage of life, you have to define what you want from life, from yourself, from the environment and place yourself in this life”. In these comments, both men reveal that we need to learn how to approach the life course with a sense of humour and by following our life goals. This approach has helped them and could help us understand ageing as an ongoing process at any stage of life.

DEALING WITH LIFE CRISES IN THE CONTEXT OF RETIREMENT

Work was an important part of life for both men. They coped with retirement differently, notwithstanding that they both felt burnt out at the end of their working lives. Mark had worked in one place his entire life but was very satisfied with his job as it had given him a kind of independence. However, he cautioned: “I was working so hard with no holidays for years because I did not want to rest”, and he was “simply burnt out” as his boss demanded he take his unused vacation days. Working as an academic, Mark travelled frequently, making friends abroad. He said that “academic work and work with students gave [him] a minimum of independence and some kind of freedom”. Nevertheless, “retirement was a serious trauma” for Mark because he has lost his sense of feeling needed. He faced a “life crisis” and in trying to deal with it, took up a new hobby but gave that up too. It was then that the “emptiness began”. He asked:

Why am I here? There is no use for me[.][...] The grandchildren began growing up. My wife started helping them, and so I switched to grandchildren and started helping them.

When Mark decided to “make his budget more flexible”, this financial motivation was also guided by a desire to “be more socially useful” – he started working as a guard in a courthouse. This new job shocked his family. Their comments (“You? An academic teacher/researcher as a guard?”, and from his favourite granddaughter, “Grandpa, so you are the jailor?”) hurt him and he struggled to finding positive ground once again.

Indeed, his attempts to find the positive aspects of the guard job demonstrate his attempts to try and overcome the apparent degradation in social status. As a well-educated man with a PhD, this 'new' position/social status brought his masculinity into question.

Jan had changed jobs many times in his working life. He had been a tutor for children with special needs, but after retirement, he pursued many different jobs not related to his previous profession, for example, greengrocer, insurance salesman, pottery salesman, and tiler. Jan thinks of these jobs as a "time of soft transition [when he] wanted to do something different, something completely different... but [he always] had a plan". Jan enjoyed these jobs even though they were below his qualifications. He just kept himself busy until he became bored. After retirement, he came back to music, as his first role was that of a music teacher. Although Jan went through some transitions in his life, he seemed to treat any difficulties as challenges, and he faced them smoothly and without excessive questioning.

ENJOYING HOBBIES AND HAVING PETS

Hobbies are an important part of life. They are a kind of engine that provides sustenance for life. After retirement, hobbies become more valuable for men because they have more free time. Jan's biography shows how music, for example, was essential to him. He noted that:

music fulfil[s] me... making music in old age is the best thing for your memory, to exercise your memory and to avoid dementia... in old age, a man could have no reason to exist, could not accept himself, and music helps [him] to not fall into nothingness.

The dream of buying another instrument makes him happy. He claims that buying another violin is a better investment than buying a new car: "[a] car bought today will be worth less tomorrow. My violin bought today will be worth double tomorrow or in the future". Indeed, Jan plays music every day for pleasure. His hobby, because of his role as a band leader, has enhanced other men's learning too. In addition to music, Jan's second passion are the mountains: "I love hiking in the mountains". Reaching another peak and being with friends has enriched his life. These hobbies have not only brought him enjoyment but have also kept him learning and enhancing his well-being.

Hobbies may be shared with others or practiced alone, as in Mark's case. He is a passionate reader of astronomy and ancient history: in his opinion, both topics are "an absolute hit", and an opportunity to deduce "how events affect the fate of humanity". Studying, exploring and discovering new facts have enabled him to reflect upon the world. However, such reflection also posed a risk to this passion when it was shared with others. For example, after retirement, Mark discovered a new interest:

I can take a photo of water towers and write short stories. The water towers are historical monuments... so they are under protection... I'll fill my time for many years... I gave a few of these stories to my wife to read and review. She said: 'Come on! You are not a humanist!'... I gave up after few years... Emptiness appeared.

It seemed important to Mark that someone reinforced and approved of his hobby. If we do what we like, what makes us happy, we get energy and power for life. We learn to accept life/ageing and do not need to question who we are as a human being or as a man/woman so often.

The analysis of Jan's life stories shows that having a pet structured the rhythm of his day and helped maintain a level of physical activity. Pets provide companionship and someone to talk to, to walk with and someone who waits for you. When pet owners get older, they do not feel lonely. The analysis of Jan's experiences as a dog owner showed it to be a good solution for physical, social and mental health.

TAKING CARE OF YOUR HEALTH AND THE HEALTH OF SIGNIFICANT OTHERS

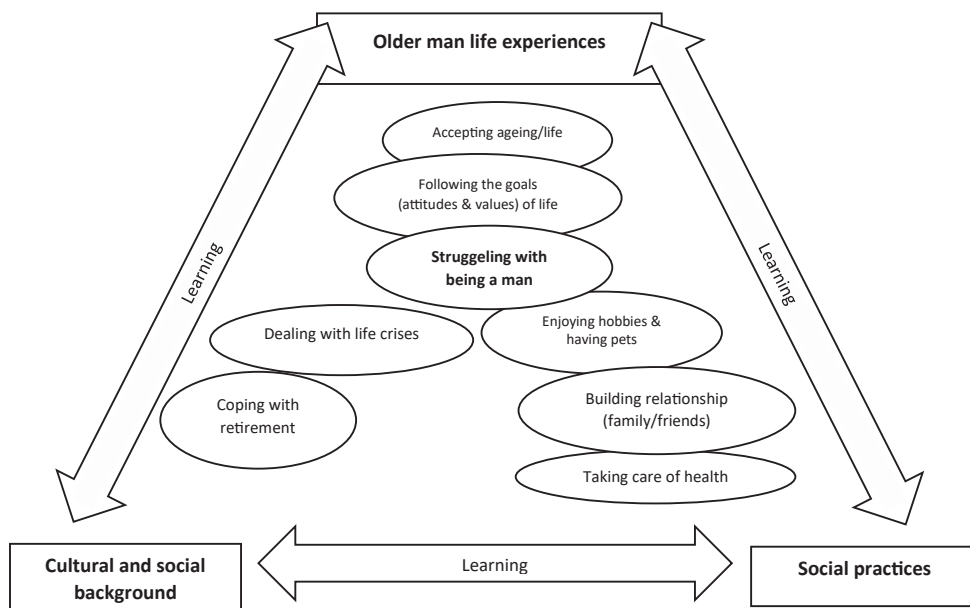
Both men's biographies reveal the importance their wives' health have for their own well-being. For example, Jan feels good and that he should not complain about his health because he is "worr[ied for his] wife's health, she is suffering," resulting in a "lack of contact with her". Mark is not healthy (he has cancer) but he does not want to talk about it much. Mark used to work a lot; he notes: "I came home only to sleep; my whole life was spent at work". As he reflected upon his life, he reasoned that he should have spent "more time with [his] family." It provided him with insight into who and what was and should have been important for him. He also now referred more to the health of his wife: "she was working very hard. She brought up four kids... I have a guilty conscience... She is exhausted [and] now she is more disabled... She devoted everything to the family". The health of significant others (wives, children, siblings, and friends) influenced the men's own well-being, and the way they have handled their own health problems. Building and taking care of relationships with their family members appeared to be fundamental to both men.

THE OUTCOME OF THE ANALYSES

From both men's biographies, I developed a schematic of older men's biographical learning (see Figure 1). The patchwork of the men's life experiences – an acceptance of ageing/ life, following the goals of life, dealing with life crises, coping with retirement, struggling with being a man, enjoying hobbies and having pets, taking care of your health, building relationships – shaped their ongoing learning process in accordance with their experiences. The 'core category' that emerged from the analysis is related to the struggles associated with 'being a man'. Masculinity was identifiable in some coded themes, for example, dealing with life crises, coping with retirement, enjoying hobbies, having pets and taking care of their health. Yet many of the identified struggles of being a man were not individual but rather socially and culturally (re)constructed. Dealing with masculinity

involved the interaction and struggle with and between institutional structures and societal conditions, including cultural and social backgrounds and how these shaped the older men's lived experiences, activities and interpretations of their biographies (Alheit, 2018).

Figure 1: The formation of older men's biographical learning



Source: Created by the author.

Each man's biographical learning has been unique and fluid and has been influenced by a pastiche of their life experiences.

DISCUSSION AND CONCLUSIONS

In the schematic, I created the triangular shape to understand the intersections of older men's ongoing learning with their backgrounds and social practices. I am drawing on Tom Schuller's⁴ triangular conceptualisation of the wider benefits of learning, where learning is positioned as

a process whereby people build up – consciously or not – their assets in the shape of human, social or identity capital, and then benefit from the returns on the investment in the shape of better health, stronger social networks, enhanced family life (Schuller et al., 2004, pp. 12–13).

⁴ Tom Schuller was the leader of project team whose aim was to "take a step forward along to the path towards a clearer understanding of how learning affects people lives" (Schuller et al., 2004, p. 4).

As this analysis has shown, men constantly construct and reconstruct their life in relation to their life experiences and interactions with specific environments. From a biographical perspective, ageing is a learning process: people (re)construct their lives, social, educational and cultural contexts, and draw from their experiences relating to social practices in those spaces. Each man has an individual ongoing biography. They build up a biographical plan of everyday actions to deal with external structure and objective facts, life's struggles (crises and successes), hobbies, emotions, habits and values. While dealing with life crises, spurred in these two examples by retirement, the struggles of being a man therefore also relate to constructions of masculinity. The clash between the two models of masculinity – traditional and modern – was visible in both biographical interviews. I argue that the socio-cultural contexts and social practices/interactions with family members reflect through life experiences and are of the utmost importance when it comes to articulations and performances of masculinity.

Mark's masculinity was put into question by his family members. In both his professional and private life, Mark has struggled with the two paradigms of masculinities. He grew up being a young researcher and lecturer, a husband and a father in a society dominated by the traditional paradigm of masculinity. As the head of his family, he worked hard to become a successful researcher and academic, and thus he anchored himself to his work. Being afraid of retirement, he found a new hobby – taking photos of water towers. When he gave this up, he noticed that the “emptiness appeared” – he experienced what is called ‘floating’. Bron (2000) has described floating as a deep feeling of being paralysed by events, circumstances or experiences, where a person cannot deal with the psychological, emotional and social aspects of their lives. The person might feel overwhelmed without any idea of what to do; this is how Mark felt. He struggled with his needs, desires, problems and the external expectations that his family had of him. “People have different expectations that sometimes are too difficult to meet, and they struggle to fulfil them as well as their wishes and dreams” (Bron & Thunborg, 2017, p. 124). Such expectations led Mark to feelings of misplacement as a husband, father, grandfather and worker; they impacted his identity as a man.

Jan seemed to align mostly with the characteristics of the ‘modern’ man, while struggling with the invisibility aspects of the traditional paradigm of ‘being a man’. The changes in his life went quite smoothly, with music helping him. His two big passions – music and mountains – anchored him to ‘his place in life’. The findings of the *Older men, music and well-being*⁵ project show that music is an integral part of men's lives. It is much more than just an activity: men described music as a part of their identity:

It helps them to regulate their moods, makes them relax or cheer up and helps them to be in touch with and to develop their emotional lives. Music also facilitates the creation of social bounds, and strengthens these men's relationships (Lindbland, 2018, p. 103).

5 The project *Older men, music and well-being*.

Jan shared his hobbies with others, both when it comes to his band and his climbing. He seemed to have very deep relationships with his wife and daughters, noting that “family is the most important thing in [his] life”. In Jan’s biography, I identified findings parallel to the results of the Harvard Study of Adult Development⁶ (Vaillant, 2012). That research suggested that one of the most important predictors of whether you age well and live a long and happy life is not the amount of money you amass or the notoriety you receive, but that the relationships with friends, and especially spouses, are core (O’Connor, 2016). The Harvard study also showed that people who had the strongest relationships were protected against chronic disease, mental illness and memory decline – even if those relationships had many ups and downs. The number of relationships does not matter as much as their quality (ibid.). Thus, perhaps the quality of relationships matters to masculinity too? Being accepted as a husband, a father, a friend, a leader of a band can engender the feeling of equality and satisfaction with life, and in turn perhaps the issues of masculinity become less important. “Biographical work is visualised as a process in which identity struggles give way to processes of floating, i.e. feelings of being fragmented without past or present, and anchoring, i.e. feelings of belonging to a specific context or grounded in oneself” (Bron & Thunborg, 2017, p. 122). The process of identity formation and transformation of older men is visible in at least two dimensions: ageing and masculinity. Ageing is a learning process, with ups and downs, related to life experiences that these two men accepted. Yet more complex and difficult to handle was being men, their masculinity. Although the pattern of older men’s masculinity is as different as their life experiences, it remains connected with their cultural and social background, and related to their connection with others. As Alheit has claimed, “the learning processes take place ‘between’ subjects and the worlds relevant to them – and these worlds change and are themselves historically variable” (2018, p. 14). The world the men live in is changing, which effects the dynamic nature of gender performances. Being a man or a woman today is different to their articulations in the past, and as I have argued in previous research, ageing is a challenge both for individuals and for society (Malec, 2012; Malec-Rawiński, 2014; 2016; 2017). I would add that it is also challenging across genders.

This explorative study of men’s ageing and their biographical learning necessitates further research. What these case studies have shown is the diversity in the life histories of older men, but also certain similar struggles and challenges. The research has illustrated how older men cannot simply be reduced to their experience of ageing, but that they also carry some continuously (re)negotiated struggles with masculinity, weaving new and rich threads for learning that are both lifelong and life-wide.

6 Harvard Study of Adult Development, <https://www.adultdevelopmentstudy.org/>.

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Tiina Tambaum, Felika Tuul, Reeli Sirotkina

WHAT IS MISSING – OLDER MALE LEARNERS OR A COMMUNITY STRATEGY?

ABSTRACT

Older men's participation in learning initiatives is low in Estonia (SHARE, 2015). The national plans for active ageing (Welfare Development Plan 2016–2023, 2016) indicate that activities related to inclusion and development are vital to improving older individuals' quality of life in the context of the 'longevity revolution'. There is little discussion about the ways in which older people themselves affect the success of these plans, and about the potential roles and opportunities for all members of the community to foster the inclusion of older people. Two qualitative studies conducted in Estonia in 2012 and 2017 expand upon the involvement of older men in different contexts. A content and thematic analysis revealed latent factors that may hinder older men's learning, such as loneliness, expectations about masculinity inherited from the cultural background, a restrictive domestic comfort zone, and a lack of demand for older men's experience. The main finding from the analysis is that older rural men in Estonia do not feel responsible for their own social health. As older men's personal initiative to create their own learning opportunities tends to be low, the community needs to provide more support for the reduction of men's indirect barriers.

Keywords: *older men's learning, barriers to learning, informal learning, rural area, Estonia*

KAJ MANJKA – STAREJŠI MOŠKI UDELEŽENCI ALI STRATEGIJA SKUPNOSTI? – POVZETEK

V Estoniji je udeležba starejših moških v učnih pobudah nizka (SHARE, 2015). Nacionalni načrti za aktivno staranje (Welfare Development Plan 2016–2023, 2016) kažejo, da so aktivnosti, povezane z vključevanjem in razvojem, ključnega pomena za izboljšanje kakovosti življenja starejših posameznikov v okviru tako imenovane revolucije dolgoživosti. Malo pa je govora o tem, kako starejši ljudje sami vplivajo na uspeh tovrstnih načrtov, ter o potencialnih vlogah in priložnostih vseh članov skupnosti pri spodbujanju vključevanja starejših ljudi. V Estoniji sta bili izvedeni dve kvalitativni raziskavi, prva leta 2012 in druga leta 2017, o vključevanju starejših moških v različnih okvirih. Vsebinska in tematska analiza je razkrila

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prikrite dejavnike, ki lahko ovirajo učenje starejših moških, na primer osamljenost, ideje o moškosti, ki izhajajo iz kulturnega ozadja, omejevalno domače območje udobja in pomanjkanje povpraševanja po izkušnjah starejših moških. Glavne ugotovitve analize so pokazale, da se v Estoniji starejši moški s podežlja ne čutijo odgovorne za svoje družbeno zdravje. Samopobuda, da bi ustvarili svoje lastne priložnosti za učenje, je pri starejših moških običajno nizka, zato mora biti skupnost tista, ki zagotavlja več podpore za zmanjšanje posrednih ovir na poti do učenja.

Ključne besede: *učenje starejših moških, ovire pri učenju, priložnostno učenje, podeželsko območje, Estonija*

INTRODUCTION

For the first time in human history societies are facing the phenomenon of population ageing, and we need to be prepared for the 'longevity revolution' (ILC-Brazil, 2015). Over the past 50 years, life expectancy at birth has increased by about 10 years for both men and women in the EU28. In Estonia, life expectancy at the age of 65 is 18.7 years on average (20.8 for women, 15.6 for men) (Eurostat, 2017). Eighteen years is equal to the period in which a newborn grows up and becomes an adult. Do we expect a kind of growth among older adults in the same length of time?

According to a socio-cultural approach to learning, social relationships are important, and knowledge is generated between two or more persons (Schunk, 2012). Learning will always take place in a social context; knowledge is socially constructed and based on experience (Elkjær, 2009). Withnall (2010) asserts that adult education and community learning for men is always contextual, with bottom-up as well as top-down features, and that it is relationship-based and contextual rather than individual, cognitive and behavioural. Based on studies of older men's learning, Golding, Mark and Foley (2014) conclude that the most effective learning method for a large proportion of men who have little prior formal education is informal, local and community-based.

The links between learning and well-being constitute the basis of active ageing strategies. Despite the fact that the definition of active ageing includes continuing participation in economic as well as social, cultural, spiritual, and civic affairs (WHO, 2001, p. 12), the existing policies pertaining to active ageing still focus primarily on employment (Foster & Walker, 2013). Furthermore, educational policy-makers tend to view education, particularly for adults, primarily in terms of increasing vocational skills and knowledge (Field, 2009; McNair, 2015). In Estonia, The Estonian Active Ageing Development Plan 2013–2020 was adopted as a response to the theme of the Year 2012, but the document lacked a means of implementation. It was integrated into the Welfare Development Plan 2016–2023, and contained no element of learning for non-professional purposes. The focus on vocational skills and knowledge in adult education is also clearly identifiable in the Estonian Lifelong Learning Strategy 2020 (HTM, 2014), which, while defining everyone as a learner, contains learning objectives only for adults up to the age of 64 (i.e.

around retirement age). A solitary measure for ITC skills is targeted to the population up to the age of 74.

Important considerations for educational and developmental activities for older people in Estonia can be found in the Social Welfare Act (2015), which defines the social services the state must provide based on need. The latter includes services to support independent coping and development strategies. Local governments are obliged to promote the creation, maintenance, and development of social relations, provide guidance on time management and the use of spare time, and develop general and personal skills by involvement in appropriate activities. However, these services are not extended to older people because of the requirement for a letter of referral. In the case of persons with disabilities, initiative or referral is presumed. However, if a retiree expresses interest in remedying deficiencies in knowledge, skills, or social relations, a lack of physical or mental diagnoses impedes an official response.

In addition to the narrow focus of existing policies on active ageing and the expectation of personal initiative, it is evident that EU Member States still lack a coherent and integrated approach, as well as a clear understanding of the gender implications of active ageing strategies (Foster & Walker, 2013). Retirement is experienced very differently by men and women: women tend to continue to live under their current conditions and to maintain their activities, but men more frequently exhibit a pattern of discontinuous retirement (Phillipson, 1998, cited in Findsen, 2006, p. 175; Arber & Ginn, 1995). Different tools and techniques are therefore required for promoting an active lifestyle in older age.

The Survey of Health, Ageing and Retirement in Europe (SHARE) of the European population aged 50 and older, in which Estonia has been included since 2011, provides an overview of engagement in non-formal and informal learning activities, such as attending educational or training courses and participating in clubs in the past 12 months. Taking courses is somewhat exceptional for older people. In Estonia 5% of men and 5% of women aged 65 and older took courses in 2015; 13% of men and 16% of women participated in clubs, which is a form of non-formal or informal learning (SHARE 2015, data base). The figures for Estonia are below the SHARE average. Older individuals who are not employed are less engaged in self-development than those who are employed, which contributes to the social exclusion of the population aged 65 and older (Myck, Najsztab, & Oczkowska, 2015). In Estonia the share of computer users is smaller among older men than among older women. In the 50–64 age group, the percentages of computer users were M 57.3% and W 70.9% (Statistics Estonia, 2016); in the 65–74 age group, they were M 32% and W 32%; and in the 75+ age group, they were M 13% and W 6% (SHARE 2013, data base).

THE PROBLEM

The reasons why someone does not participate in community-based learning endeavours are difficult to explore. Studies have shown that it is easier to reach people who are already

involved in similar activities (e.g. the study in Northern Ireland conducted by Mark, Montgomery and Graham 2010), and in Slovenia by Jelenc Krašovec and Kump (2014)).

One possible obstacle between older men and non-formal learning is the lack of previous (positive) learning experiences (Formosa, Frago, Jelenc Krašovec, & Tambaum, 2014; Golding, 2011), and in some cases, men appeared to define themselves as 'non-learners' as a way of expressing their independence and masculinity (Field, 2006, p. 136). At the same time better education is one of the factors associated with the probability of living longer (Jürges, 2009; Leopold & Engelhardt, 2013). For example, in Estonia there is little difference in the level of education between men and women aged 65 and older (Statistics Estonia, 2017): 60% of the men have at least an upper secondary education compared to 62% of the women, and 35% of the men have a higher level education compared to 34% of the women. Therefore, the common argument that men define themselves as 'non-learners' may not always be applicable when it comes to older people.

There is also no basis to the claim that men are generally less engaged in learning than women. The results of surveys conducted in Canada indicate an 'iceberg' effect on older men's learning – men are accustomed to being engaged in informal learning while working, and in retirement they continue to develop their skills and knowledge through housework (Livingstone & Scholtz, 2006). The 1998 NALL (New Approaches to Lifelong Learning) and 2004 WALL surveys showed that the vast majority (80 per cent) of those who were engaged in housework, volunteer work and general interest activities were involved in some type of related informal learning. In 2004 the proportion of men involved in informal learning through housework, volunteer work or general interest activities was slightly higher than the respective proportion of women (ibid.). Studies in Australia and Ireland (in 2008 and 2009) also confirm that informal learning is particularly valuable for men who are no longer employed (Mark & Golding, 2012).

As pointed out above, social relationships are important for learning (Schunk, 2012). Loneliness as the lack of meaningful social contacts is perceived as subjective feeling (Cacioppo & Patrick, 2008) and may occur after retirement. Coping with loneliness is connected on the one hand with social stereotypes and on the other with the possibility to participate in the community. As a loner you are stigmatised, and masculinity can be a barrier to overcoming loneliness:

According to definitions of hegemonic masculinity, not only should men display the aforementioned traits (independence, competitiveness, assertiveness, emotional detachment and physical competence), they should also reject social closeness, outward display of emotion and vulnerability – traits associated with femininity. Among older men, there are several factors that can threaten the maintenance of a masculine identity, including poor health, decreased mobility, increased reliance on others, and seeking traditional health-care services and community-based services for help with loneliness and social isolation. (Reynolds, Mackenzie, Medved, & Roger, 2015, p. 533)

Formosa (2014) states that the reasons underlying men's less frequent participation in non-formal learning activities is their content and the manner in which they are advertised. Studies conducted at Australian Universities of the Third Age reveal that older men's and women's interests are different, i.e., they like to do different things (Williamson, 2000 in Russell, 2007; Hooyman & Kiyak, 2002 in Mehrotra, Wagner, & Fried, 2009). At the same time the empirical and theoretical works on reducing the obstacles to older people's learning and development are often based on the assumption that such individuals are generally open to suitable learning opportunities. The assumption of immanent motivation on the part of older men – that they are waiting for proper offerings and suitable types of learning opportunities – could be faulty (Tambaum & Kuusk, 2014; Canning, 2011).

The research question is how to support the social relationships of older men and what kind of possibilities there are to empower older men to participate in community-based learning.

METHOD

The first qualitative study was carried out among older men in the rural municipality of Tartu, Estonia in 2013. The initial information on male pensioners was provided by the municipal government, after which the interviewer contacted the men by telephone. During the interviews the men recommended other interviewees, the circle of which also expanded thanks to the municipality's residents, including recommendations from the leaders of local activities.

The data were gathered via semi-structured interviews to determine the indicators of the men's desire, motivation and organisational expectations regarding their readiness to be involved in social interaction and community undertakings, including learning activities and knowledge sharing. A total of 31 men were interviewed. The semi-structured interviews lasted 1–1.5 hours. The inductive content analysis method (Franzosi, 2008) was used to analyse the interviews. The men were not explicitly asked about the obstacles to their active involvement in the community. Nevertheless, they felt it necessary to talk about the barriers. Categories emerged from the data and were included in the content analysis scheme until most of the text could be classified. The content analysis revealed the men's experiences to be loneliness, expectations about masculinity inherited from their cultural background, expectations about individualism inherited from long life, and the lack of demand for older people's knowledge and experience.

A similar qualitative study was conducted among rural and urban, active and inactive men aged 60 and older in eastern and southern Estonia in 2017. The analysis presented in this paper is based on interviews with rural men, and 59 out of 94 interviews constitute the data set for the second study. The sample was selected according to the same principles that guided the first study five years earlier. In this study, respondents were explicitly asked about their obstacles to being active in the community, e.g., 'If you feel excluded

from your community, please give an example'; 'How do you deal with this feeling of exclusion?'; 'What can be done to avoid it?'; 'What other problems do you face in your community as a member of the older generation?'; and 'Are there many older men in your community who are not participating in community life?' The thematic analysis (Braun & Clark, 2006) was based on the whole interview in order to identify phrases about the five types of obstacles listed above. All of the barriers and obstacles revealed in the first survey were represented in the 36 interviews of the second.

RESULTS

The experiences of older men in the first survey, which were confirmed in the second, revealed four major groups of reasons that contribute to the learning process in the community.

Unsolved loneliness

As people age, they find themselves increasingly lonely. Many friends who they enjoyed spending time with have passed away; relationships between friends have changed; there are new and unfamiliar people in the village; they only have contact with acquaintances with whom they do not have meaningful relationships; and friends and acquaintances are reluctant to join them in activities. The following sentiments by an interviewee indicate that an older man is often left alone among unfamiliar people:

When we discuss sports, this K. gets angry. This K. always presses me. Then you give up. With my old friend, we understood each other but he is no longer with us.

Our analysis revealed that although older men are clearly aware of the need to compensate for their physical disadvantages, social disadvantages are not perceived to be an object of personal concern. They describe their problems of physical health together with the solutions they have found for them; at the same time, social disadvantages ("a friend passed away"; "I feel bored at home") are recognised with no personal initiative to do something about the situation.

Expectations about masculinity inherited from the cultural background

The sense of awareness of how things should be in cultural settings is very evident in reading the experiences of these men:

These are not people of my era; they do things their own way.

And similarly:

Our country is built like this. Have you ever heard someone talking about the republic's best plumber or best toilet unclogger? They talk about artists! You can live without art but what will you do if your toilet is clogged?

The status of a pensioner is perceived in a stereotypical way; in the words of one of the men:

Going to the city is good for a change. But then you go to a store and do not buy anything, and you feel embarrassed.

Furthermore, the stereotypes about learning affect the way in which the older generation thinks about themselves as learners:

I often feel that I have run out of time to start something big, to waste capital.

If their masculinity is threatened by stereotypical expectations, men tend to withdraw from the community. On the one hand, older men think there is no justification for their study but on the other, they think they have the skills they need for daily life:

I am not so stupid that I need to start learning something now. I have intermediate skills. There are enough activities to fill my time.

Although these men are aware of their lack of basic contemporary skills, they feel that they can manage with their existing skill-set or that the effort would be justified if personalised learning is offered:

I cannot use a computer; I get a headache. I do not want to learn. [Pause.] Actually, it would be good to learn to use a computer. Payments and things. But where would you go? I guess I'm not finished with learning. My brother knows how. A good teacher would be needed; one who would not get upset with a dullard.

Lack of demand for older people's knowledge and experience

The two studies in Estonia pointed to the untapped potential of older men sharing their skills and knowledge, and this topic has been explored by Tambaum and Kuusk (2014).

Expectations about individualism inherited from long life

The psychological limits to older men's learning can arise from having lived a long life. This creates a domestic comfort zone that promotes disengagement. The more older people have seen and experienced, the better they can predict the outcome. Consequently, it is difficult to find new ways to arouse their interest.

As people age, they are surrounded by an increasing number of belongings. For example, many men in rural areas have their own workshops with tools and workbenches. They always prefer to go to their own sauna instead of the village or the neighbour's sauna. The objects in one's own familiar environment are more convenient to use than those offered elsewhere. Consequently, their activities inevitably become more circumscribed with age. The saturation of life places higher demands on the community:

Recently the municipality organised a tour of Piusa for pensioners. I have seen these sand pillars. They have remained similar, not interested.

The feeling that they have already seen, heard and learned everything tends to create a sense of superiority that acts as a barrier between the individual and a changing society. This was particularly evident in the men's opinions about using or learning to use a computer. Only seven of the 31 rural men interviewed in the first survey (2013) were using or had used a computer, and 28 out of 59 rural men from the second survey were using a computer. In the first survey, the remaining men were vague and uncertain about their opinions, believing, on the one hand, that they did not need a computer, while musing, on the other, that they should probably learn to use one.

Older men construct psychological limits related to ageing by comparing their current condition with their previous selves, and themselves with younger people. One of the men commented on participating in the Defence League:

I don't want to run in the forest with people who are younger and stronger.

Such mental constructions prevent them from feeling comfortable in normal community interactions, and lead to a sense of personal disappointment and demotivation for learning. In addition to comparing their current with their past abilities, the respondents also compare themselves with younger people, and believe that they are a hindrance to the young.

DISCUSSION

Articles on reducing external obstacles are often based on the assumption that older people are internally motivated, that they are open to suitable opportunities if offered and adequately informed. This study has found that the assumption of internal motivation is arbitrary.

Most of the subjective obstacles identified in these studies – the unsolved loneliness, the perceived differences inherited from the cultural background, as well as the mental image of one's own limited abilities and opportunities – are descriptors of a restrictive sense of security or, in other words, of the ways in which older men confine themselves to a prison of their own making. The solution to surmounting these perceived restrictions must come from outside. A sense of security is a mental construct, which is not necessarily an accurate reflection of the actual level of risk or security (De Donder et al., 2013). For example, a survey by Belgian Ageing Studies (*ibid.*) indicated that the reduced availability of public services in their neighbourhood affects older people's personal sense of security. Several obstacles to participation in community learning are caused by unfamiliarity with other people in the neighbourhood, both in their own and in younger age groups. Our studies have found that a lack of friends and acquaintances does not increase older men's readiness to seek new comrades. Older rural men in Estonia do not take personal

responsibility for their own social health. Their passivity reduces the probability of their participating in community activities and learning.

Zarifis (2014) has noted that while much of the literature on successful and productive ageing focuses on the personal characteristics of individuals as determinants of the types and amounts of learning activities in which they engage, there is no formula for empowering men (younger or older) to take responsibility for their own learning. The World Bank (2002) has defined empowerment as the process of increasing the capacity of individuals or groups to make choices and to transform those choices into desired actions and outcomes. In the case of Estonia, older men need to be introduced not only to how to make or evaluate choices but also to *the need* to make choices. Older men must be made aware that one's social health is as important as one's physical health.

One difficulty with regard to older men is that they may no longer have any close or reliable friends because of the gap of life expectancy between men and women. As we saw from our survey, it is very difficult for men to make new friends or even meet people. Therefore, more responsibility should fall on the municipality. Communities should organise events with the deliberate aim of introducing people to each other, and where contacts are intentionally created. This step would create an opportunity for the development of further interaction and communication. Establishing new contacts would make it possible to implement a buddy system to attract older people to community activities. Studies have indicated that older people are more concerned about the care of others than they are about themselves (Canning, 2011); Withnall, McGivney and Soulsby write that “[c]ollective rather than individual approaches often work best” (2004, p. 11). Empowerment strategies initiated by community facilitators should provide the means for the older target group to involve others. Cascading empowerment could solve the problem of feeling lonely among strangers and increase the number of participants.

Our studies show that disappointment in their own decreased abilities promotes isolation among older men. A range of data on education, training, health and well-being confirm that men encounter various dilemmas as they age, particularly after retirement (McGivney, 2004; Schuller & Watson, 2009). Our qualitative data indicate that older men tend to compare their reduced abilities with their past abilities relative to younger people. This means that older men are concerned with age comparison which is compatible with the outcome of a study conducted in Ireland where men in a literacy course “felt that younger learners [...] have different attitudes to older men, which has a negative effect on the group dynamic” (Mark, Montgomery, & Graham, 2010).

External support is needed to help men become aware of self-defeating thought patterns, raise self-esteem, and promote living in the present and in the future instead of in the past. Empowerment (Cusack, 2000) will probably not solve all the problems of ageing men. Researchers have found that the absence of clear social guidelines and norms about what it means for men to be ‘retired’ constitutes a highly ambiguous issue in contemporary society (Formosa, Fragoso, Jelenc Krašovec, & Tambaum, 2014).

As it is recognised that learning begins with a question (Jarvis, 2006), knowledge sharing could provide a path to learning and, according to our results, would probably be one of the preferable options for older men. Making use of men's existing skills and knowledge as an important component of their learning is mentioned with regard to men's shed-building projects in Australia and the UK (Mark & Golding, 2012). It is important to develop and share "what they know rather than emphasizing what men cannot do or do not know" (Golding, 2014). The literature has emphasised the importance of recognising the skills and knowledge that older adults have in abundance (e.g., Field, 2009) but, as emerged from the current study, community learning opportunities have to contend with the infrastructure that older rural men have erected in their homes as well.

Raising participation levels among males could be in the interests of the wider community and society (Mark et al., 2010). Social and educational policies need to give further consideration to the role of community organisations in making a long-term commitment to improving opportunities for older men's learning (Formosa & Fragoso, 2014). Attracting and keeping older men in community-based learning is a long-term (Askam, 2002) community responsibility.

CONCLUSIONS

This study on the subject of older men's learning indicates a continuing need to explore the reasons for men's lack of participation by focusing on older men who are not involved in community-based learning, rather than on exploring good practices and motives for participation among those who have taken advantage of such opportunities.

Although gender issues constitute a major theme in the academic analysis of older adult learning (Formosa, Fragoso, Jelenc Krašovec, & Tambaum, 2014), our study shows that older men may be equally concerned with age and aspects inherited from their long life may have implications on their readiness for community learning. It also highlights a need for social guidelines and norms regarding what it means for men to be 'retired', as this represents a highly ambiguous issue in contemporary society.

An important and unique role for communities emerged in connection with solving the problem of older men's social passivity. Older men encounter several challenges that prevent them from taking part in community activities. These barriers include expectations about masculinity inherited from the cultural background, low personal responsibility for their own social health, a lack of consciousness of the need for or importance of social engagement, disappointment in their own reduced abilities, and a 'defensive' domestic comfort zone. The solution to removing these, often unconscious, restrictions should come from outside.

The results of this study highlight the unique role of community members and facilitators, and identify a need for a long-term community learning strategy.

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MEN'S GENDER CAPITAL EXPERIENCES IN LATER LIFE

ABSTRACT

Over the last decade there have been substantial advances in understanding the gendered dimensions of ageing. Prior studies have mostly dealt with understanding the lives of older women while largely neglecting or omitting older men. The focus on women facing disadvantages in socio-economic and marital status has shifted to men's post-work and health issues in the last few decades, and only recently to masculinities and gender capital in later life. Contemporary discussions on cultural and gender capital bring relevant recognition and somehow unintentionally reveal that gender can matter to the same extent or even more in old age than in childhood or adulthood. This article analyses the results of semi-structured in-depth interviews with 98 men aged 60 or more and other data collected in Slovenia as part of the Old Guys Erasmus+ project. The project results are in line with recent studies on gender capital and masculinities, and justify why older men should be seen, discussed and examined as individual agents who practice, perform and produce gender in later life too. They also explain why hegemonic masculinity is only one aspect of gendered life experiences and that different masculine realities stand alongside each other and are as necessary for men in later life as femininities are for women, particularly in contemporary societies where both aged men and women are seen and represented as de-gendered, un-gendered or even genderless.

Key words: *gender capital, masculinities, ageing, de-gendered aged people, later life*

IZKUŠNJE MOŠKIH Z DRUŽBENOSPOLNIM KAPITALOM V POZNEM ŽIVLJENJSKEM OBDOBJU – POVZETEK

V zadnjem desetletju smo priča precejšnjemu napredku pri razumevanju o spolnih razsežnosti staranja. Predhodne raziskave so se večinoma osredotočale na življenje starejših žensk, starejše moške pa so zanemarile ali izpustile. Od proučevanja socialno-ekonomskega prikrajšanja starejših žensk in vdovstva so se šele v zadnjih desetletjih usmerile tudi na zdravstveni in poupokojitveni položaj starejših moških, prav pred kratkim pa so začele osvetljevati tudi moškosti in družbenospolni kapital v poznem življenjskem obdobju. Aktualne razprave o kulturnem in družbenospolnem kapitalu prinašajo pomembna spoznanja, hkrati pa nenamerno razkrivajo, da je družbeni spol v starosti enako pomemben, kot je v otroštvu ali odraslosti, če ne še bolj. V članku analiziramo rezultate polstrukturiranih poglobljenih

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intervjujev z 98 moškimi, starimi 60 let ali več, in druge podatke, zbrane v Sloveniji v okviru projekta Erasmus+ Old Guys. Rezultati projekta odsevajo ugotovitve nekaterih študij o družbenospolnem kapitalu in moškostih ter utemeljujejo, zakaj je treba (ne)dejavnost starejših moških proučevati prek samih akterjev, ki v poznem življenjskem obdobju še vedno izkazujejo, izvajajo in proizvajajo družbeni spol. Prav tako pojasnjujemo, zakaj je hegemonika moškost le eden od vidikov ospoljenih življenjskih izkušenj ter da različne moške stvarnosti stojijo druge ob drugi in so v poznem življenjskem obdobju za moške pomembne v enaki meri kot različne ženskosti za ženske. To je v sodobnih družbah, v katerih so tako starejši moški kot starejše ženske dojeti in prikazani kot razspoljeni, odspolnjeni ali celo brezspolni, še toliko bolj pomembno.

Ključne besede: *družbenospolni kapital, moškosti, staranje, razspoljeni starejši ljudje, pozno življenjsko obdobje*

INTRODUCTION

Over the last decade there have been substantial advances in understanding the gendered¹ dimensions of ageing. Feminist studies in particular have deepened issues such as gender roles, identities, relationships, and social capital in later life. As already acknowledged by many scholars, prior studies mostly dealt with understanding the lives of older women while older men have been largely neglected or omitted (Vandervoort, 2000; Arber, Davidson & Ginn, 2003; Mackenzie et al., 2017; Foley, 2018). Although the focus on women facing disadvantages in socio-economic and marital status (women's disadvantages from age and gender inequality as well as widowhood) has shifted to men's post-work and health issues (the loss of the role of men after retirement, and mortality), the subject of men and (hegemonic) masculinities in later life has only recently gained more attention (Connell, 1995; Connell & Messerschmidt, 2005; Arber et al., 2003), particularly with current studies on cultural and gender capital (Bridges, 2009; Huppatz & Goodwin, 2013; Huppatz, 2012; Thompson & Langendoerfer, 2016; Thompson, 2018) and men's community-based activities in later life (Carragher & Golding, 2015; Golding, 2015; Mackenzie et al., 2017; Golding & Foley, 2017). Recent works on the gendered dimensions of ageing have unintentionally revealed that gender matters a lot in later life, probably more than was assumed in prior studies. Thus, the first section of this article briefly summarises recent relevant findings on the gendered dimensions of ageing.

The second section is dedicated to gender capital and masculinity capital – issues that become promising although they are rarely discussed in the context of later life. We tried to justify why older men should be seen, discussed and examined as individual agents who practice, perform and produce gender. We also considered why hegemonic masculinity is only one aspect of gendered life experiences and that different masculine realities stand alongside each other and are as necessary for men in later life as femininities are

¹ When the term gendered is used, it means “ideas about gender: assumptions and beliefs on an individual level as well as societal level, and how they affect thoughts, feelings, behaviours and treatment of women and men” (Arber, Davidson, & Ginn, 2003, p. 4).

for women, particularly because both older men and women are seen and represented as de-gendered, un-gendered, genderless (Thompson, 2018). All these theoretical views and definitions further help us interpret the results of the Slovenian part of the *Old Guys Say Yes to Community*² study presented in the third section. A sample of the extensive qualitative study carried out as part of the project, and a content analysis, which was focused solely on the experiences of men with gender capital in later life, is discussed there. Besides presenting the main results of the study on gender capital, we begin by reconstructing two stereotypes that were most frequent in public discussions that we organised as part of the project. The discussion also casts light on other relevant results from the Slovenian study sample, and in particular the insights into how men aged 60 years or more create and produce masculinities and masculinity capital in later life. Besides this, older men's narratives are discussed and examined through individual agents who also practice, perform and produce gender in later life. The final chapter draws attention to some of the shortcomings of the study as well as to the further needs and possibilities of exploring the topics discussed.

WHY DOES GENDER MATTER IN LATER LIFE?

As already indicated, recent work on the gendered dimensions of ageing has unintentionally revealed that gender can matter even more in old age than in childhood or adulthood (this is mostly due to the sociological rather than the psychological or the physiological aspects of later life, as argued further on in this section). To support this bold assumption, a brief summary of relevant prior findings is necessary.

First, the inequalities that persist between women and men over the whole course of their lives (for example, education level, occupational segregation, income, etc.) become intensified in old age, resulting in 'cumulative disadvantage' (Cruikshank, 2003). In Slovenia the mirror reflection of cumulative disadvantage can be seen in statistical data: while the suicide rate is highest among (older) men and widowers, two thirds of retired people at risk of poverty are women (55,000 or 20.9%, compared to men, 10.4%) (SURS, 2018). Intensified inequalities in later life have mostly been discussed with the accumulation of effects across the life course, but not on the basis of gender capital experiences that might be relevant for aged people and that can change (dramatically) in later life. As already proved by Arber et al. (2003) socio-economic circumstances and the life course of older people continue to connect with and impact on identities, social relations and social well-being in later life but in different ways according to gender. Second, gender roles might change in older age (to remain independent, widowers who had never done household work before learn how to take care of themselves, or men learn how to take

² The project is part of Erasmus+ (Strategic Partnership for Adult Education, agreement number: 16-KA204-021604, case number: KA2-AE-9/16) and took place between October 2016 and August 2019. The leading organisation was the University of Ljubljana; the partner organisations were the Slovenian Association of Adult Educators, the University of Algarve, the University of Wrocław, Tallinn University and the Association of Estonian Adult Educators – ANDRAS.

care of their spouse in later life, etc., and *vice versa*, older women start to do things they had never done or been able to do because of family obligations or other reasons; among other things, they start to study).

Third, older adults perceived as a de-gendered group (Thompson, 2007; Gleibs et al., 2011) are confronted with new and (un)known situations, roles, assigned identities and attitudes towards them in later life, which are different for women than for men. De-gendering theory proposed that gender becomes a less central aspect of the self as people grow older. Although rejected by many scholars and critical studies, it prevails in contemporary hegemonic discourse on ageism. People become quite comfortable living in their gender costumes, therefore taking them off in old age is not easy (Ryle, 2018). The period of partnering, parenting, and making a living places specific demands on people's performances of gender. "Widowhood and old age might be perceived as a chance to escape those demands, but a closer examination reveals an important dimension of the way those demands are experienced by real people in their everyday lives" (Ryle, 2018, p. 161). Davidson (2001) has shown that for older women, widowhood may lead to a new-found sense of freedom and autonomy, whereas widowers can see no advantages at all to being a widower compared to being married. In his most recent book, Thompson (2018) argues that older men are neither 'de-gendered' nor 'ungendered' nor 'genderless', as often perceived in the discourse of ageism: "To all intents and purposes, growing old seems to be outside conceptualisation of masculinity. In most discourses one can be masculine and one can be old, but not both" (Thompson, 2018, p. 4). Men have trouble dealing with older age because they have followed a masculinity script that left little room for them to negotiate unavoidable problems (Thompson and Langendoerfer, 2016) or because they were left with the 'incomplete masculine script' that concludes somewhere before old age (Spector-Mersel, 2006).

Furthermore, treated as a homogenous group defined solely by age and ageism, older adults face stereotypical and discriminatory attitudes on a daily basis and differently regarding their gendered identity. As discussed by Arber et al. (2003, p. 3), the current generation of older women have had a very different life course from older men. In terms of cohort changes, the lives of women have changed enormously over the last century and the present circumstances of older people can only be understood by reference to their prior life course. Similarly, Thompson (2018) argues "in a manner parallel to the absence of a life span time perspective in masculinity scholarship and thus men's studies emphasis on never-ageing masculinities, the field of social gerontology long employed a lens in which ageing adults were portrayed as gradually moving along a life course unaffected by gender relations, practices and preferences." (p. 5) He also argues for using terms such as 'ageing men/aged men' and 'old/very old' instead of 'older', which "homogenises the vast differences among mature men and blurs the distinctive life experience of middle-aged and older men. It segregates all of these older men as a single group, distinguished from the category 'younger'" (Thompson, 2018, p. 9).

Besides, contradictions with (and within) hegemonic masculinities and traditional femininities may arise and may heighten the advantages or disadvantages of gender capital

(due to the decline of physical health, cognitive capital, etc.). For example, the fact is that older women are more likely than men to spend their final years being cared for by agencies (institutions) outside the family, while widowhood has become normative in western societies (Arber et al., 2003). Another example is 'the othering of ageing' by using non-gendered nouns such as 'seniors' or 'elders' instead of 'old men' (Thompson, 2018). Besides this, older women are facing heavy pressure to 'stay' young and 'look' young, which is less pronounced for men as they age (Featherstone & Hepworth, 2000; Arber et al., 2003), the so-called double standard coined by Sontag (1978). Gender issues also become more and more relevant before retirement since the demand for stereotypical feminine skills (social interaction and embodied performance) is rising as the labour market is changing; this may mean "that working-class femininity is becoming more desirable and sought-after than working-class masculinity" (Huppertz & Goodwin, 2013, p. 296). Furthermore, current discourse on ageing tends to universalise the past and present experiences of men and women so that all differences (including class) disappear.

Last but not least, social support literature has consistently shown that both singlehood and widowhood have different consequences across gender lines (Vandervoort, 2000), among other reasons because men and women are more likely to rely on women as their primary source of emotional support during their whole life and even more in later life (Antoucci & Akiyama, 1987; Belle, 1987; Kessler, McLeod, & Wethington, 1985; Vandervoort, 2000). This finding is in line with the recognition that women are more likely to get involved in caregiving activities, are more responsive to the life events of others, and are engaged in more emotionally intimate, dyadic relationships; men, on the other hand, tend to be more oriented toward socialising or group-oriented social activities compared to women (Vandervoort, 2000). Numerous studies have underlined that women are the ones who bring 'significant emotional events' (Freud, 1964) to people's lives in old age, which are necessary for self-realisation and self-actualisation, and for people to be deeply understood, accepted and valued for what they are at any given point in their life course. This point came very much to light throughout our *Old Guys* research, as presented later in this article under the subtitle 'Priceless wife/partner'.

GENDER CAPITAL AND (HEGEMONIC) MASCULINITIES IN LATER LIFE

Connell's concept of hegemonic masculinity has undergone fundamental transformations during the last few decades and Connell herself played a central role in the reformulation of the concept (Connell, 1995; Connell & Messerschmidt, 2005). Hegemonic masculinities have been broadly used as a specific type of masculinity that subordinated other masculinities and femininities to provide men with guidelines and models of masculine conduct so that they could behave properly. The concept turned out to be applicable to all contexts of organising and understanding gender hierarchy. But hegemonic masculinity limited the male figure to a very specific type of male codes and images (western, white, middle-aged, middle class, heterosexual, etc.), and excluded all other existing patterns of masculinity, not only non-hegemonic masculinities but femininities as well.

Drawing mostly on Huppatz and Goodwin's (2013) article on men's gender capital experiences in working life and other feminists' appropriation of Bourdieu's concept of capital, this section tries to define how male and masculine embodiments can operate as a form of capital which might be accumulated and transacted. Our approach to gender and ageing tries to see beyond solely categorising and comparing male and female, focusing on how and where masculinity and femininity are culturally learnt, produced and reproduced, to avoid the generalisation or universalisation of the differences between masculine and feminine positions, dispositions, practices, and experiences, including class, in the lives of men and women. 'Gender capital' makes gender central in the social space. „Prior structural analyses have certainly provided invaluable insights into the social inequalities of gender relations and their reproduction. Still missing is the theorising and investigation of men's lived experiences with bodily ageing and getting older in economically developed typically ageist societies” (Thompson, 2018, p. 6). We assume that although it is a concept or construct, 'gender capital' can contribute to making men's experiences in later life visible and present.

Johnson and Repta (2012) emphasised the need to understand gender as plural, relational, multidimensional, and deeply contextual. “Gender is indeed a social and linguistic construction, a nonstable meaning ascribed to the male and female, but instead of categorising and comparing males and females, it is important to focus on how and where masculinity and femininity as social constructions are produced and reproduced” (Huppatz & Goodwin, 2013, p. 293). Bourdieu defined four forms of capital (economic, social, cultural, and symbolic) while several feminist scholars argue that gender disposition may also act as capital, and suggest broadening Bourdieu's notion of capital to include gender as 'embodied cultural capital' (McCall, 1992; Skeggs, 2004; Bridges, 2009; Huppatz & Goodwin, 2013). For Bourdieu (1986, 1991, 2005), capital was a resource for class distinction that defines how opportunities are enabled or constrained for individuals in a given field. But embodied cultural capital also takes the form of long-lasting dispositions of the mind and body possessed through the processes of self-improvement or socialisation (Huppatz & Goodwin, 2013). Gendered norms and behaviours are not natural or genetic but taught and learnt. Each societal construct of masculinity varies over time and according to culture, age and position within society (Connell, 1995).

Huppatz and Goodwin (2013) conceptualise gender as cultural capital that exists as feminine, masculine, female and male. “Female capital and male capital relate to the gender advantage that is driven from being perceived to have a female or male body, whereas feminine capital and masculine capital relate to gender advantage that is driven from a disposition or skill set or from simply being hailed as feminine or masculine” (Huppatz & Goodwin, 2013, p. 295). Thus, masculine bodily appearance is only one dimension of masculine capital, a 'muscular masculinity' (ibid., p. 300). Drawing on culturally learned femininities and masculinities, gender capital is a capital that is available to men and women (Huppatz & Goodwin, 2013). It comprises the “knowledge, resources and aspects

of identity available—within a given context—that permit access to regime-specific gendered identities” (Bridges, 2009, p. 92). “Gender capital is also defined, employed and evaluated within a patriarchal gendered order that values a hierarchical relationship between masculinities and femininities, regardless of contextual distinctions” (ibid., p. 93). However, stereotypical or hegemonic gender dispositions may be the most rewarded dispositions and are more likely to be symbolically legitimated (Bridges, 2009; Coles, 2009; Huppatz & Goodwin, 2013).

To restate, male capital relates to the gender advantages that are derived from being perceived to have a male body, and this form of capital is distinct from the capital that flows from being perceived to be masculine (Huppatz & Goodwin, 2013, pp. 299–300). Masculine capital relates to the gender advantages that are derived from culturally and socially learned masculine roles, norms, attributes, behaviours, positions, dispositions, practices, experiences – that are produced and reproduced within a given society as masculinity (or better yet, masculinities, although mostly recognised only as hegemonic masculinity). Masculinity and femininity are relational concepts, which only have meaning in relation to each other (Connell, 1995); in this regard we cannot analyse masculinities without also acknowledging and recognising femininities. At the same time, masculinity and femininity are ‘asymmetrical’ (Skeggs, 1997) and are inherently historical (Connell, 1995). Their making and remaking is a political process affecting the balance of interests in society and the direction of social change (ibid.).

In contrast to some feminist scholars who claim that women not only accumulate capital, they also possess their own feminine forms of capital, our study situates itself within a gender relations framework which conceptualises masculinities as relatively enduring sets of normative male practices yet simultaneously as practices that are open to and currently undergoing normative shifts (Golding, 2015; Mackenzie et al., 2017). Doing gender differently can be advantageous in later life. Among older men, there are “several factors that can threaten the maintenance of a masculine identity, including poor health, decreased mobility, increased reliance on others, and seeking traditional health-care services and community-based services for help with loneliness and social isolation” (Reynolds et al., 2015), among other also hegemonic masculinities and traditional femininities.

Drawing on 98 sources of scientific data (articles, papers, studies, etc.), some of which were published sometime after 2000, Thompson and Langendoerfer (2016) assessed to what extent old men used the 1950s and 1960s ‘masculine blueprint’ as defined by Brannon (1976)³. They support the argument that “performances of masculinities remain important to older men” and that “older men appear to have embodied masculinities and acquired a gender habitus which resembles Brannon’s ‘blueprint of manhood’. Further, in

3 To sum up Brannon’s definition of the ‘masculine blueprint’ in four categories: (1) show no weakness and emotional vulnerability; (2) strive to be respected and admired; (3) stay strong, silent and calm; (4) never give up and live life on the edge.

the absence of distinctive cultural guidelines as to how to be an ageing man, the rules that older men followed were nuanced versions of the idealised masculinity script” (Thompson & Langendoerfer, 2016, p. 136). They also found out that “men typically present narrative identities in keeping with the hegemonic young man model of masculinity, and, most likely, their former selves” (ibid.); older men were also not pleased with the de-masculinised way they were treated within ageist encounters or their occupying of an ‘otherness’ status (ibid., p. 137).

We explored men’s ‘gender capital experiences’ within feminised/masculinised social and community spaces available for men in later life; and within a society where the hegemony of agrarian patriarchy was replaced with new practices of ‘the separate sphere’, ‘the cult of youth’, and the socialist ‘cult of solidarity’ and ‘manhood’ that idealised the strong, self-confident, working, independent common man, who provides housing, safety and everything else necessary for a decent life. The cohorts of men in our study are from generations (mostly born in the 1940s and 1950s) when gender identities and practices were scripted by clear heteronormative and ageist masculinity directives, which provided men with a ‘blueprint’ for their behaviour and emotions.

THE METHOD AND THE SAMPLE

This article is based on extensive qualitative research on the inclusion of older men aged 60 or more in local communities in Slovenia, which was carried out in the spring of 2017. The research includes three focus groups, 98 half-structured in-depth interviews, 10 case studies of good practices, and a review of existing academic literature and Slovenian and European policies on education and inclusion of older adults of local communities for better quality of life.

Of the 22 participants included in the three focus groups carried out in Ljubljana-Bežigrad (2) and Ajdovščina (1), 5 were representatives of municipality, city, and town institutions, 6 were representatives of public institutions, and 11 were representatives of non-governmental organisations or civil society. Of the 98 interviews chosen for analysis, 42 were conducted in the urban environment of the capital (Bežigrad)⁴, 41 in a half-urban municipality (mostly Ajdovščina)⁵ or nearby rural areas, and 15 with other active older adults, so-called sociocultural animators in various parts of Slovenia, mainly from rural environments or from smaller towns (6 in the Posavska region, 2 in the Gorenjska region, 2 in the Osrednjeslovenska region and 1 in the Jugovzhodna region), as well as 4 from

4 The district community of Ljubljana-Bežigrad is the wealthiest quarter of the capital of Slovenia according to GDP per capita, is part of the region with the highest monthly average income per capita (1,099 EUR in 2015), and has the lowest risk of poverty rate (11.8) (SURS, 2017).

5 The municipality of Ajdovščina lies in the Goriška region in the western part of Slovenia. It was hit by two economic crises in the last 30 years. Although the western part of Slovenia used to have higher quality of life compared to regions in the eastern part, Ajdovščina has lost this privilege as a result of the crises and is now in the national average. For a special analysis of older men’s participation in Ajdovščina, see Gregorčič (2017).

Ljubljana. The sociocultural animators were selected by the students of the Socio-Cultural Animation and Education for Community Development course at the Department of Educational Sciences.

The average age of the interviewees was 71. The most represented age groups were 60–69 (46%) and 70–79 (41%), while the least represented age group was 80 years or more (12%). Three retired persons younger than 60 were also included in the research. The youngest interviewee was 56 years old and the oldest 86. The majority of the interviewees had completed upper secondary education, that is, general, vocational, and technical upper-secondary education (ISCED level 4 and 5) (54%), followed by a completed first cycle of tertiary education, that is, higher vocational education and higher professional and academic education (ISCED level 6) (25%). 10% of the interviewees were less educated, with three interviewees who had not finished primary education, three who had completed primary education (ISCED level 2) and four who had completed lower secondary education (ISCED level 3). Similarly represented were interviewees who had completed the second and third cycle of tertiary education (graduate and postgraduate, ISCED level 7 and 8) (11%). 95% of the interviewees were retired, and 5% of the interviewees aged 60 years old or more were still employed. 3% of the retired interviewees were still registered as economically active as sole proprietors or carrying out another form of paid work. The majority of interviewees were married or in a relationship (79%), 15% were widowed and 5 interviewees were single or divorced.

The semi-structured interviews took an average of one hour and a half and were as a rule conducted by qualified interviewers at the interviewees' home, their NGO office or other place they had chosen as a 'safe space'. The interviews consisted of four sets of questions: (1) the interviewees' personal life histories; (2) their roles in the community and their understanding of the community; (3) an assessment and understanding of the lives of men aged 60+ in their communities, their knowledge and skills; (4) their engagement with and participation in formal and informal organisations as well as the advantages in knowledge, skills, attitudes and practices they had gained in that way. The interviewees were guaranteed anonymity; therefore, the research findings are presented in a way that does not reveal their identities.

The method of open coding and selective/focused coding (Glaser, 1992) was used in the first stage of analysis, to find preliminary thematic categories arising from the interviewees' statements and to develop conceptual categories that synthesise more data/codes (ibid.). For the purpose of this article, we focused only on the gendered dimensions of aged men: *when* and *why* gender was mentioned or used/expressed in the narratives, as well as in what way, in what contexts. Besides content analysis focused on gender/ed life histories, life situations and interpretations, we also conducted discursive analysis when applicable. Other relevant data from the research were also examined through the same lens. In this article we provide some examples from the interviews to illustrate men's gender capital experiences, particularly masculine capital.

RESULTS AND DISCUSSION

During our project, we were faced with two stereotypes. The first one was based on the assumption that older men do not deserve “special research attention” and the second one was “aimed against” the very active students in later life – older women. However, the study has shown that men stay at home for very different reasons (their pension is too low, stress upon retiring, lack of social contacts, erased past life histories, social spaces and masculinity spaces, etc.). They create or do things mostly within their family circle, neighbourhood or village, rather than in educational and other civil society institutions which had not been traditionally intended for men, or in the wider community and its organisations if they had not been involved in them before retiring or if they had not prepared for that themselves before their retirement (see Gregorčič, Jelenc Krašovec, Močilnikar, & Radovan, 2018). One of the most important reasons for their inactivity is also the absence of a clear masculinity blueprint in later life.

Men in later life do not deserve “research attention”

The first stereotype which we encountered in public discussions, focus groups, in consultations with stakeholders in the education of older adults etc., was reproduced by men and women alike, although more often by men than women, by experts and laypersons alike, and especially by the interviewees in our study since we posed numerous questions directly asking them about the “(in)activity of older men in the community”. They referred to gender inequality, namely citing “women as the ones” who have actually been marginalised or underprivileged their whole lives and saying that men thus do not need “special treatment”, particularly not in the context of “marginalisation”. Moreover, they did say that women, in addition to all the work they do for their partners, “take care” of them and often look after them in the latter part of their lives. A 66-year-old sociocultural animator from an urban environment provided a multifaceted view of the issue:

I think that women feel a stronger need to socialise, while men prefer their peace and quiet, and they stay at home. They do attend various events but not any activities. There are only women in the folkloric association, there are no men, except for two musicians. Even in the pensioners’ association, there are almost only women. Men are not involved in those different associations that we have. I think that men prefer their peace and quiet. We used to join associations in order to socialise, participate in performances, events and to meet girls. Today, young people who join them do not have these interests anymore. Back then the focus was on quality, while now it is more on quantity. It used to be spontaneous, meeting people from your own neighbourhood. I’ve known some of them for 50 years now. You can learn a lot in every association. For me, it was a ‘school for life’.

Similarly, the stories of some other active interviewees indicated that in the socialist period (in the 1960s and 70s), where and how a person was (socially) engaged used to

be more important than their level of education, profession or job. And yet, our study has shown that the vast majority of the interviewees actually generalised the social inactivity of older men as “male inactivity” in later life. In fact, they claimed that men do not deserve “research attention” simply because they are “lazy”, “keeping themselves company is enough” or even “too much”, that they are “loners by nature”, that they “age sooner than women”, that they “do not feel like doing anything else than lying on the couch all day”, “watching TV” or going to “the pub”. The premises from which they started are very important in terms of their view of old men and masculinities in later life, since it is precisely those views of masculinity/masculinities that define masculinity capital in later life. Likewise, the interviewees did not try to defend men's active ageing by referring to various activities and behaviour that older men otherwise carry out and that they carried out themselves. In their stories, they even cited a wide range of tasks “around the house” and “for the home” (building houses or fixing up their children's apartments, working in the workshop, babysitting grandchildren, helping neighbours), working on the farm (the vast majority of the interviewees worked in their garden, farm, vineyard, orchard, apiary, around their vineyard cottage, shed or boules court, etc.) or their hobbies and leisure activities (hiking, firefighting, tennis, football, folklore, etc.). Almost a third of the interviewees perceived a certain part of their apartment as ‘their space’ – most frequently the study or a special room that served as a library, computer room, studio or music room, and some also had a workshop or a wine cellar, etc. A great many of the interviewees found ‘their space’, peace and activity in hiking and mountaineering, which were their everyday activities. Some of them took up these recreational activities for health reasons, but most of them had been involved in ‘their’ recreational activity their whole lives, and walking in later life meant spending their free time in an active and healthy way.

Nevertheless, the study has shown that older men are active and busy but that after retiring many of them had their masculinity space contracted to a context within their family, relatives, neighbours and village, particularly in the rural environment. On the other hand, older men from urban neighbourhoods, who did not have a garden, a shed, a workshop or another ‘space of their own’, where they could meet friends, neighbours, etc., and who were not active in associations and NGOs, stayed at home. Furthermore, the interviewees made it very clear that their home had also changed – it was no longer a meeting place for various casual visits from friends or a gathering place, as people's habits had changed. Especially in urban environments, older people have shut themselves off for greater safety (to protect against theft, burglary, dealers, insurance agents, etc.) using different security systems, thus also isolating themselves from their neighbours and friends, whereas in some places in the country they have to hire security guards or ask their relatives to look after their houses during funerals or major holidays. Although the interviewees always first referred to pubs when defining a masculine space, many of them explicitly stressed that they did not frequent “men's pubs” in their towns any more even though they still existed in some places.

Denying older women's general activity and the construction of 'otherness'

Only a few interviewees from our study tried to argue in favour of the assumption that older men are also socially active. If they were asked to explain further or clarify, they justified it mainly ideologically, as being self-evident and not needing additional explanation. Secondly, they justified it with the argument of gendered and ethnic differences: by 'attacking' the activity of older women (or denying their activity) as well as by differentiating themselves from immigrants coming from the former Yugoslav republics. In doing so, in the same way as the wider society assigns them an 'otherness' status (Thompson and Langendoerfer, 2016), they also constructed otherness for older women and former migrant workers.

We have to underline once again that only a handful of interviewees argued in favour of an apparent masculine status of the active and the busy. And yet, their views are important and suggestive because they defended them by 'attacking' women's general engagement after retiring in pensioners', charitable, and other civil society and educational activities as well as social life in general. Their views have to be considered also in terms of cohort changes – the lives of women have changed enormously over the last century (Arber et al., 2003) – as well as through the social engagement of older women, which has changed considerably in Slovenia, including in the field of education, seeing as the Slovenian Third Age University, which has been operating for 30 years, is extremely active, widespread and widely attended in Slovenia. A 79-year-old retired primary school teacher from a half-urban environment constructed such a stereotype quite vividly when he answered a question which made no reference whatsoever to men's or women's activity in the following way:

A: And would you say that, because of that, you are sometimes lonely?

B: Lonely? No way. I'll put it this way. Women are stupid, especially those that are not educated, but all of them go to the Third Age University [laughs]. Either they were in need of studying or something, now they all want to hold a master's degree. I had an excellent teacher, who said to me back then, 'Now you're struggling but when you start working, you'll need something completely different.'

Their attempts to deny 'older women's active life' were also symptomatic, considering that interviewees 'defended' the apparent, although non-existent 'social activity of older men' in the first part of the interview, while in the second part they acknowledged and faced the fact that 'women are everywhere, while men are nowhere'. A 71-year-old retired locksmith from a half-urban environment answered the question, "Would you say that there are differences with respect to role and status between men and women of your generation in your community?" in this way:

By and large, there's a matriarchy now. Everywhere now, the woman is the man of the house.

The interviewees also justified older men's social inactivity through comparisons with immigrants from the former Yugoslav republics who have lived in Slovenia for 30 years or more. This is displayed in the statement of a 67-year-old retiree with secondary school education, who lived in an urban neighbourhood with the greatest share of immigrants from the former Yugoslav republics and advocated the position that this is not his (Slovenian, masculine) habit:

Those southerners of ours are much more active when it comes to socialising. You can see the difference there. They socialise a lot, they're in groups all the time. As regards Slovenians, they're more loners, at least that's what I think. They're alone more. They like going solo. I don't need anyone either, because then you have to take him into consideration too. Even if I go hiking, it's not the same if I go alone or with someone, because then I can't do what suits me best. A lot of those little Bosnians of ours have gardens, then they have some garages, and then they gather there, around those garages, and then they criticise what others have done. But they wouldn't do anything themselves.

However, an analysis of the interviews conducted with former immigrants, who were also included in our study, has shown that their social connectedness was not due to their ethnic or cultural differences, attributed to them by their Slovenian-born peers, but mainly because their former status (migrant, refugee) had marked them considerably and they had to endeavour to integrate appropriately into Slovenian society (local contexts) their whole lives, and to bring their wife and children with them, enabling them to have a decent life. As regards social capital, some of them were placed at a substantial disadvantage compared to other older men because their children had resettled in various European countries, while their relatives lived in Croatia or Bosnia, and because of their low pensions, poor health, etc. they were not able to visit them anymore. Additionally, after retiring they struggled to keep in touch with their former co-workers because they used to be employed in traditionally male professions and sectors (construction work, etc.), which were characterised by high labour turnover, frequent company bankruptcies and low salaries, or they were burdened with their past status (Yugoslav military officers, etc.).

Priceless wife/partner

Our research further outlined very traditional, hegemonic gender identities: the "pricelessness" and "importance" of a wife/partner for older men in later life; they ran the household, managed the finances, took care of their husbands, children and grandchildren, planned how to "survive" the month on low incomes, planned for ageing and the necessary age-related changes in the household, helped the wider family, and on top of that offered support, affinity, and information based on the women's more numerous contacts and wider social networks. The research found that the interviewees have a relatively high level of dependence on women as companions and a strong emotional, social and informational reliance on them, as they can be the "first caregivers" and often also the "first confidantes".

The interviewees generally replied to the questions about who they can rely on, who they trust, who provides them with emotional support if they need it or who would help them if they fell ill with “my wife”; “my kind-hearted wife”; “I can only trust my wife”; “The first one is my spouse, it’s no secret, that way it’s easier for her and for me”; “I can’t turn to anyone other than my wife”; or, as a 69-year-old married and very active retiree from a half-urban environment said, “My wife and I support each other in general. Yes, there’s no doubt that my wife would be the first one I’d ask for help.” Earlier in the interview, he pointed out that he had hidden the seriousness of his health condition from his wife, so the interviewer asked him whether he had confided in anyone else: “No, no [laughs]. A hero to the end!”

Some interviewees thought that it was “inappropriate” to go around and socialise with friends if you have a wife, children and grandchildren at home or that you should also take care of your wider family in later life, primarily because “his wife will take care of him when he falls ill” anyway. This assumption was clearly made by a 62-year-old widower whose wife had died in an accident. He came from a half-urban environment, had a vocational qualification and was still in an employment relationship. Among other things, his statement alludes to the fact that “the pub” is an acceptable, safe, neutral, uncreative space for older men and, as such, accepted or approved as a suitable space also by their partners, whereas creating somewhere else (in the social and public sphere) could fuel mistrust between two partners or even lead to a conflict.

A: Do you think that there are many older men in your community who are not engaged in the life of your community?

C: Well, certainly there are many of them, certainly there are. Those who still have their partners and family certainly have their lives, are spoiled by their wives and so on. If, for example, they’re in poor health or if they have anything else, the woman is the one who takes care of them and so the man automatically doesn’t consider going somewhere away from home to create. He may go to the pub and that’s it, but in principle such a person stays at home and creates at home. Like I say, you then actually view your life in that way, when you help your children, grandchildren, you teach them, show them some good work, all sorts of skills that you have. If you have a wife, then you don’t need to go out, because two spouses are that true connection, while men will be men... Then we already begin getting out of the family community. If I take myself as an individual, since I don’t have a wife anymore, I can then seek some company somewhere, I’m also thinking about seeking it. But if a husband and wife are still together, then I wouldn’t be thinking about it. Then I’d rather use that time with my partner and for some nice moments with her.

The loss of a wife/partner was the hardest change for elderly men who were subjected to it. They described this experience as “the world falls apart”. Their wife had been the planner of all daily activities as well as other plans, “what to do, how to live”. It was apparent

that their wives influenced the structuring of the men's activities (they planned holidays, vacations, celebrations, everyday living, etc.). The easiest way to overcome these situations was by working or being active in other ways, which confirms the importance of productivity for men in later life. Some also overcame them with a systematic search for a new woman in their lives, from the point of view of support and care provided to men by women during this life stage, as already found in Gott and Hinchcliff's (2003) study.

In cases where the wives were younger and actively employed, these men assumed many prevailing women's roles or obligations (taking care of the household, babysitting grandchildren, etc.), i.e. feminine capital, without any doubts of going 'against' masculinity. This indicates that some masculinities in later life have already shifted from hegemonic masculinities which used to define past periods of life or that they began redefining with age. The interviewees highly valued family and relied on the help of their children. Due to modern employment, work hours, labour market conditions, and lifestyles, most of the material assistance was still provided by the older generation (financial help, building a house, gardening, babysitting grandchildren, shopping), while the children helped them with information and advice (finding information on the internet, advice on illnesses and other problems). There were also rare cases where financial assistance was offered by children to their parents who had had poorly paid jobs in the past; this assistance was often in the form of home sharing, and the elderly in return took over various (often household) chores and babysat the grandchildren. Moreover, interviewees described accepting help, which from the point of view of hegemonic masculinity represents failure or a defeat of masculinity, with dignity, expressing appreciation and praise for their children.

Incomplete script for performing masculinity in later life

The preceding sections have already revealed some elements of hegemonic masculinity ("Us men don't give in!"; "A hero to the end!") but at the same time a reconstruction of masculinity into a negative or deviant direction ("lazy", "the pub", "lying around"). The interviewees were reluctant to refer to older men's activity or back it up with examples from their community, association, organisation or group even though half of all the interviewees were actually very active. We have discovered that they had some difficulty in finding positive examples or best practice examples of men's active engagement because they were inhibited by their view of masculinity, which was still perceived within the framework of hegemonic masculinity, but they were nevertheless already rejecting and redefining it, as is demonstrated in this section. First, let us review three statements that allude to hegemonic masculinity. A 64-year-old retired lawyer replied to the question about who provides him with emotional support if he needs it in this way:

Nobody. I've never thought about that. I solve most things by myself. When I'm faced with a problem, I don't allow any commiseration. I think of the most terrible, worst-case scenario and then I build my defence system. That's my way. Then it's never as terrible as it could be, but it might be. I prepare for the most terrible situation. That's what's stuck with me from my past life.

When asked whether retiring had implied any stress or whether he had possibly been afraid of retiring, a 69-year-old retiree from a half-urban environment replied:

No, not at all. Not in the least. For me, retiring was as normal, to put it in layman's terms, as going to the pub for a drink. Absolutely, there was no stress at all.

Moreover, the following significant statement shows the interviewees' strong connection to their fathers' lives, or rather the hegemonic masculinities from over half a century ago with which they had been socialised and had grown up. Even though the vast majority of the interviewees linked the happiest event of their lives to family life (the birth of a child, their wedding, grandchildren, etc.) or to a successful professional life, some of them described certain difficult moments in their lives which had marked them, as the happiest events of their lives. A 69-year-old retired interviewee with a vocational qualification said the following:

I lived in a very patriarchal family and at that time we greatly respected our parents. At our house, dad was the one who influenced us. If he was in a good mood, we were all in a good mood; if he was in a bad mood, we were all in a bad mood. And the whole family lived together like this. At that time, people weren't going on holidays much. We kept asking him to go for a whole year, but he kept saying no. But when summer came, he said, 'Let's go.' And we went all across Yugoslavia and so we bonded as a family, got to know each other, learned to give things up for each other. When dad was pleased, he lit a cigarette and then that was a celebration for the whole family.

Both the subordination to past hegemonic masculinities as well as the surrender to today's hegemonic masculinities were commonly present among almost all interviewees, but our discourse analysis and content analysis have indicated how the interviewees had already redefined masculinities in later life. Specifically, as established by Thompson (2006), "lived masculinities are negotiated performances that help maintain the gender scripts that are 'out there' in culture, institutions, and in relationships, and reveal relations of dominance and subordination" (p. 634). The interviewees from our research also acted according to what was expected of them – at home, in their families, as well as in their communities and the wider public. In doing so, they often found themselves in conflict with hegemonic masculinities because the only category remaining from Brannon's definition of the 'masculine blueprint' was number (3), to stay strong, silent and calm, which they could also hold on to in later life. Many interviewees were not able to follow the other three categories anymore. Category (1) states to show no weakness and emotional vulnerability; however, mainly due to widowhood, separation from their partners, loneliness, illness, the negative life experiences they had when being forced to retire or upon a company's bankruptcy, due to low pensions, etc., they exposed numerous vulnerabilities, sorrows, fears and anxieties in their stories, which had marked them throughout. Some interviewees thought that it was 'inappropriate' to go around and socialise with friends if

you have a wife, children and grandchildren at home or that you should also take care of your wider family in later life, primarily because 'his wife will take care of him when he falls ill' anyway. This assumption was clearly made by a 62-year-old widower whose wife had died in an accident. He came from a half-urban environment, had a vocational qualification and was still in an employment relationship. Among other things, his statement alludes to the fact that 'the pub' is an acceptable, safe, neutral, uncreative space for older men and, as such, accepted or approved as a suitable space also by their partners, whereas creating somewhere else (in the social and public sphere) could fuel mistrust between two partners or even lead to a conflict.

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The loss of a wife/partner was the hardest change for elderly men who were subjected to it. They described this experience as "the world falls apart". Their wife had been the planner of all daily activities as well as other plans, "what to do, how to live". It was apparent that their wives influenced the structuring of the men's activities (they planned holidays, vacations, celebrations, everyday living, etc.). "The easiest way to overcome these situations and because I'm in poor health she sometimes invites a couple of friends too". Many of them started attending various activities thanks to their partner's encouragement, motivation or even needs and wishes.

CONCLUSION: RE-DEFINING MASCULINITIES FOR LATER LIFE

As indicated in our research and previous studies, contemporary society offers older men an incomplete script for performing masculinity. "Western masculinity scripts are not designed for older people, and therefore are concluded somewhere before 'old age'"

(Spector-Mersel, 2006, p. 73). Older men thus lack an alternative to midlife masculine ideals, depriving them of guidelines for being accepted, needed and valued in society, and limiting their ability to fashion effective and culturally respectable identities. Discussion about masculinity has so far been largely focused on hegemonic masculinity, not on the gender capital experience throughout life, including in later life. In the end, studies have often overlooked cohort changes, class distinctions, urban/rural differences, etc.

Our research revealed that interviewees gave up (or even rejected) most of the aspects of hegemonic masculinity, even though it had dominated their childhood and working years. Some changed unhealthy lifestyles (starting with alcoholism) along with exclusively male leisure groups the way they used to be like in clubs, pubs and cafés. However, they were not against other male activities based on productivity, creativity or recreation. On the one hand, they highlighted craftwork and knowledge, and on the other, literary works, rescue campaigns, historical memory (associations preserving the values of the National Liberation Struggle⁶), cultural and sports events and celebrations, neighbours helping neighbours, and household work. In their interviews, they portrayed a different masculinity script which they lived in later life, suggesting a re-definition of the masculine capital in later life.

In this context, they emphasised the need for a different social creative space into which older men could fit, where culture and tradition had a central place. Most often, it was described as an “open space for spontaneous creativity, socializing and games” or as an “open and inclusive space for all generations and genders”. Interviewees from both urban and rural areas referred to such a space as a “common area”, a “cultural centre” in the sense of sports and cultural institutions like *Sokol* or *Partizan*⁷ and similar public cultural institutions, which used to be the centres of culture, sports, creativity, performances and celebrations in local communities and residential districts. Institutions that used to include and integrate all generations, all knowledge, all members of society, etc., hardly exist anymore in Slovenia, and at the same time, only a few villages and towns (such as the ones surrounding Ajdovščina) have community centres that combine their main purpose with culture and the inclusion of older people. The interviewees stated that communities have disintegrated because of the modern way of life and that for a sense of community (for societal purposes), one needs a community space. This space may combine educational as well as practical, cultural, sports, entertainment and professional activities; and last but not least, it must be open and meaningful to all generations, not just older men.

Although this study provided many insights into men’s gender capital experiences in later life and supports our bold assumption that gender matters a lot in later life, our capacity to

6 *Narodnoosvobodilni boj* was the name of the Slovenian liberation movement during the Second World War.

7 *Sokol*, founded in 1863, was the first sports association in Slovenia, while *Partizan* evolved out of *Sokol* in the time of socialist Yugoslavia. *Sokol* was modelled on the association in Prague bearing the same name, founded a year earlier. Both associations/institutions were often the central community space in town, providing sports and cultural activities and events for all generations as well as political meetings and other engagements of the community.

draw definitive conclusions on the basis of these findings is clearly limited. However, we gained many insights into how interviewees learnt gender in later life and how they re-defined it through their perceptions, aspirations, needs, understanding and life situations. We have also seen masculinities as relatively enduring sets of normative male practices yet simultaneously as practices that are open to and currently undergoing normative shifts (Golding, 2015; Mackenzie et al., 2017) and how doing gender differently can be advantageous in later life. We have also pointed out the contradictions between the masculinities performed by the interviewees in real life and hegemonic masculinities dominating the discourses and practices in modern societies. Last but not least, we have also shown the contradictions between existing or emerging masculinities in later life on the one hand, and de-gendered theory, which sees men only as the elderly and not as men, on the other. Aged men are both masculine and old, and future studies will have to tackle the challenge of how to understand gender as plural, relational, multidimensional, and deeply contextual (Johnson & Repta, 2012) also in later life.

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Simone de Beauvoir

STAROST

1. Stališče zunanosti

Ljubljana, OPRO – Zavod za aplikativne študije, 2018

Monografija *Starost* celostno obravnava starost, danes osrednje družbeno vprašanje

Delo Simone de Beauvoir zajema vrsto romanov, obsežen skupek prijetno berljivih zapisov o Parizu in času, ko so Francozi še slavili svojo kulturo, svoje pisatelje in svoje intelektualce. Toda avtorica monografije *Starost* je prepričana, da intelektualci pač niso intelektualci, če ne presežejo interesov svojega družbenega razreda in se ne posvetijo skupnosti. Da je sama temu vodilu sledila, se je najprej izkazalo z objavo njene odmevne monografije *Drugi spol* (1947). »Ženska se ne rodi, ženska to šele postane,« je zapisala v ilustracijo vpliva družbe na posameznika ter koncepta družbenokulturnega spola.¹

»Človek se ne rodi star, star postaja in postane,« bi po analogiji lahko dejali za njeno drugo prelomno monografijo *Starost* ali esej o starosti, kot ga sama imenuje. Prva ga je pred skoraj 50 leti objavila pariška založba Gallimard (1970), v nekdanji skupni Jugoslaviji nam je bila dosegljiva v izdaji beograjske založbe BIGZ (1986). *Starost* sem tako zdaj prebrala vnovič z večje kritične razdalje in zanesljivo trdim, da delo v družbi globalnega kapitalizma ni izgubilo svoje aktualnosti. Prav nasprotno!

Simone de Beauvoir zanimajo ne le posameznik, ki se stara, marveč in predvsem družbena določila staranja in starosti skozi zgodovino, v njeni in naši porabniški družbi, razmerje med starajočim se posameznikom in družbo. Ob branju monografije pa postane očitno, da se od antike sèm ni kaj dosti spremenilo. V vseh obdobjih so bili stari izgnanci iz družbe, trdi Simone de Beauvoir. Podobno pravi tudi Corvisier: »Naj spregovorijo vsi, tudi tisti, ki jim je petdeset let« so besede, s katerimi so na agori vabili svobodnjake, naj spregovorijo o javnih rečeh.² Členek *tudi* se je ohranil vse do današnjih dni in kaže, da starejši danes, tako kot nekoč, niso pripuščeni k odločanju o javnih rečeh. Podobno kot danes so tudi nekoč v antični Grčiji pri starosti 60 let starim odvzeli ključne javne funkcije sodnikov, vojakov, arbitrov in jim v zameno prepustili zgoj, denimo, varovanje ozemlja

1 De Beauvoir, S. (1968). *The Second Sex*. New York: Modern Library.

2 Corvisier, J. N. *La vieillesse dans le monde antique : aspects démographiques et conséquences sociales* (<https://journals.openedition.org/etudesanciennes/1032>).

ali utrjevanje utrd. Razumljivo, kajti položaj mladih in starih zmeraj določajo generacije na sredi, tiste »merodajne«, ki jemljejo mero vsem drugim.

Človeka, kot smo že videli, ni mogoče obravnati z vidika ene same vede, še posebno ne človeka z družbenega roba. Podobno kot so približno v istem času ravnali tudi nekateri slovenski avtorji, je avtorica monografije *Starost* spoznanja o staranju in starih črpala iz vsega, kar ji je bilo na dosegu roke: umetnosti, filozofije, literature, sociologije, ekonomije. Virov, z izjemo del antične, klasične ruske ali francoske književnosti in medicinske literature, na temo starosti je bilo v nasprotju z današnjim časom malo. Celo psihologija staranja je bila zgolj v povojih. Avtorica pa razlaga človečnost zgodovinsko in antropološko, z vidika marksizma in fenomeologije.

Čeprav sta danes starost in staranje pogosta, celo modna tema, pa se zdi, da ob *Starosti* še zmeraj ni drugega podobnega dela, ki bi celostno obravnavalo vprašanje z biološkega in družbenega vidika hkrati, skozi zgodovino in v primežu družbenih sprememb, pojavov in paradoksov. Starejši so začuda svojo vlogo zmeraj sprejeli. Danes pa bi se resnično morali upreti političnim in drugim diskurzom o slabotnosti in odvisnosti, a to ne bo mogoče, če se ne bodo ovedeli svojega vsiljenega jim položaja in če ne bodo sami pripomogli k temu, da se ta spremeni. Odnos do starih je v porabniški družbi po mnenju Simone de Beauvoir stranpot civilizacije. Ni nujno, da takšen tudi ostane!

Simone de Beauvoir najprej govori o biološkem staranju. Gube se poglobijo, razmerja obraza se spremenijo, lasje se stanjšajo, upočasnijo se presnovni procesi. Nato piše o načinu življenja, o vplivu družbe na staranje, starost in stare. Težnja vsake družbe je, da preživi, poudarja, zato povečuje moč in mladost ter se boji uničujoče sterilnosti. Tudi zato je nekoč veljalo, da je vodje, ki ostarijo, treba čim prej odstraniti in jih zamenjati, da bo skupnost varna. Starce so tako v zgodovini obredno fizično usmrtili ali pa so se ubili sami, danes pa jim fizično smrt preprečujemo, a jih prepuščamo socialni smrti, ko jim otežimo vstop v javnost, ko jim z zakoni otežimo delo, ker jih ne slišimo ali jih slabo slišimo. Starost je bila dolgo zgolj priprava na smrt in ne obdobje življenja! Tudi danes naj bi bilo tako, le da se danes smrti ne omenja. Celo na univerzi za tretje življenjsko obdobje se te teme na željo študentov ogibamo.

Simone de Beauvoir v prvem delu monografije navaja številne citate, ki slikajo odpor do fizičnega staranja: starost je upad, je grdota, je smrad. Še več! Starost so dolgo obravnavali kot čas, podoben otroštvu, piše Simone de Beauvoir. Kako naj danes s tako preteklostjo, zapisano v našem kolektivnem spominu, starost vidimo drugače in kako naj delujemo drugače? V današnjih družbah, opozarja avtorica, se starejšim ne posvečamo, četudi s tem zanemarjamo svojo lastno prihodnost.

Delo *Starost* je danes še bolj aktualno, kot je bilo ob svojem nastanku. Razkriva korenine našega razmišljanja in ravnanja in tudi tako bi ga veljalo brati; s svinčnikom v roki, v nenehnem iskanju podobnosti in razlik med preteklim in sodobnim časom ter v iskanju boljših odgovorov in rešitev. Danes je – in jutri bo – starost lahko drugačna, a potrebni so ozaveščenost, vednost, znanje, upor in delovanje. Morda se bo sprememba zgodila, ker

starci nismo več redki kot nekoč, ker bomo morali prevzeti odgovornost za skupno prihodnost generacij. Branje dela *Starost* je zagotovo vreden korak na tej poti.

Dušana Findeisen

Alan Walker (ur.)

THE FUTURE OF AGEING IN EUROPE
Making an asset of longevity
Singapore, Palgrave Macmillan, 2019

Za zadnje stoletje je značilno, da se je pričakovana življenjska doba podaljšala za približno 30 let. Pričakovana življenjska doba v Evropi je bila leta 1900 med 45 in 55 let, leta 2010 pa med 75 in 85 let. Staranje prebivalstva je velik izziv za različne institucije, a ni modro razmišljati le o potrebnih oskrbi za tiste skupine starih, ki potrebujejo pomoč, temveč bi morali razmišljati tudi o tem, kako aktivirati potencial dejavnega staranja, saj večina starejših ni nemočna. V knjigi so zbrani prispevki prav o tej temi. Nastali so v okviru petletnega projekta MOPACT – Mobilising the Potential of Active Ageing in Europe, ki je vključeval 32 institucij iz 13 držav (gl. www.mopact.group.shef.ac.uk) in je potekal od leta 2012 do 2017. Področja, ki so jih raziskovali, so predstavljena skozi poglavja v zborniku, in sicer: (1) strategije za dejavno staranje v Evropi, (2) doseganje gospodarske vzdržnosti v starajoči se družbi, (3) učinkovite in vzdržne pokojnine, (4) podaljševanje delovnega življenja, (5) spodbujanje zdravja in družbene vključenosti, (6) uporaba tehnologije. O družbeni opori starejšim v dolgotrajni oskrbi razmišljajo z zornega kota možnosti za socialne inovacije, o promociji politične vključenosti in participacije starejših pa s psihološke in sociološke perspektive. Cilj projekta je bil razviti čim več strategij za dejavno staranje in opolnomočenje starejših.

Od leta 1993 se število raziskav, politik in praks, ki promovirajo dejavno staranje,¹ povečuje, s tem da je bilo dejavno staranje (kratkovidno) povezano predvsem s podaljševanjem zaposlenosti. V projektu MOPACT avtorji nasprotujejo zožitvi pojma dejavno staranje zgolj na podaljševanje zaposlitve starejših in ga opredeljujejo kot kompleksen pojav in strategijo, ki sta obravnavana in uresničena interdisciplinarno. V središču pozornosti je dejavna participacija starejših in ne toliko delo kot zaposlenost. Avtorji večkrat zapišejo, da dejavno staranje ne pomeni le podaljševanja zaposlitve kot profitne dejavnosti, temveč tudi izmenjavo znanja, razvijanje različnih zmožnosti ... Kot okvir interpretacije za dejavnost se uporabljajo socialnoekološke teorije, ki zajamejo človeka-v-okolju, in teorije življenjskega poteka, ki obravnavajo človeka v celotni biografiji. Raziskave potrjujejo, da so za blagostanje v starosti pomembni izkušnje in dobri odnosi. Ob tem se bralec spomni

1 V slovenskem strokovnem okolju ni soglasja o uporabi besedne zveze »dejavno staranje« za *active ageing*; ponekod srečamo besedno zvezo »aktivno staranje«, drugod pa »dejavno staranje«.

na različne kritične razprave o koristnosti nekoristnega (Nuccio Ordine), o modrosti v starosti (Monika Ardelet), ki obdobje starosti predstavljajo kot enako pomembno za človeštvo kot obdobje mladosti ali odraslosti.

Za naše okolje je zanimivo, da je izračunani kazalnik dejavnega staranja (AAI, The Active Ageing Index)² za Slovenijo nizek, pod evropskim povprečjem (EU 28). Svoje mesto smo našli med Romunijo in Bolgarijo. Kazalnik vključuje štiri področja: zaposlitev; družbena participacija; samostojno, zdravo in varno življenje; zmožnosti za dejavno staranje. Vsako od teh področij ima še podrobnejšo členitev. Področje samostojno, zdravo in varno življenje denimo zajema dostop do zdravstvenih storitev, finančno varnost, učenje in telesno dejavnost.

Najvišji kazalnik imajo na Švedskem, v Švici in na Islandiji. Za Slovenijo avtorji kot prednost navajajo, da je pri nas dobra dostopnost zdravstvenih storitev, da imamo dobre izobraževalne dosežke in da so ljudje fizično varni. Kot slabosti pa ugotavljajo nizko stopnjo zaposlenosti v starostni skupini med 55 in 64 let, še posebej je nizka zaposlenost žensk v tej skupini. Kot pomanjkljivost navajajo tudi nizko politično participacijo, telesno dejavnost, mentalno blagostanje in uporabo IKT.

Razvoj strategij dejavnega staranja je povezan z mnogimi dejavniki (lokalna politika, evropska politika, zaposlovalne politike, finančni sistemi ...). Zagotoviti je treba ustrezno okolje, da lahko starejši participirajo na trgu dela (tisti, ki to želijo), da zdravo živijo in da so dejavni v drugih dejavnostih, na primer prostovoljstvu ali izobraževanju.

Avtorji in avtorice ugotavljajo, da je treba v evropskih državah razvijati nove strategije za dejavno staranje tudi zato, ker se povečuje skupina starejših od 80 let. Njihove ugotovitve kažejo, da bo k razvoju novih strategij za dejavno staranje pripomoglo tudi to, da se razvija pozitiven pogled na stare, da se prebivalci ozaveščajo o tem, da so stari lahko akterji sprememb in da lahko sami razvijejo družbene inovacije. Stereotipi o starejših (starizmi) so v našem okolju zelo trdovratni. Poleg rušenja stereotipov je treba prepoznati heterogenost med starejšimi glede na kronološko starost, bogastvo/revščino, izobraženost, zdravje in podobno. Možnost za dejavno staranje naj imajo vsi, ne le pripadniki družbenih elit. Inovacije morajo zajeti ekonomske in socialne možnosti (med drugim tudi izobraževalne dejavnosti za starejše), upoštevati raznolikost institucij, ki so lahko del medsebojnega povezovanja za socialne inovacije.

Zdi se, da je pred strokovnjaki in strokovnjakinjami veliko možnosti, da oblikujejo nove pristope za boljše življenje v starosti, za kar sta nujna tako povezovanje med različnimi področji kot povezovanje s skupinami starejših.

Tadej Košmerl

² AAI je skupni kazalnik za EU, ki kot kronološko mejo, nad katero so ljudje vključeni v kategorijo »stari«, šteje 55 let.