

Ageing as a Social Challenge

Individual, Family and Social
Aspects in Poland

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Introduction

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Introduction

Global ageing as a call and context for research

The ageing of populations is a complex social process that the World Health Organization's demographic forecasts show to be inevitable and irreversible. The ageing process is a universal phenomenon that touches every individual, family, local community, and society. However, while the biological processes associated with ageing are similar for human beings worldwide, ageing as a personal and social phenomenon encompasses far more than just physical changes: the way in which elderly persons and their families experience ageing is shaped by younger generations' attitudes toward the elderly, by the government policies implemented to support older adults, by local initiatives undertaken in communities to help older adults stay active in their old age,¹ and by the ways in which the elderly themselves understand their own mortality.

Since the 1950s, the United Nations Department of Economic and Social Affairs has published demographic projections for the world population. A consensus eventually arose among forecasts that by the year 2100, the global population could be expected to reach 10.9 billion. However, in July 2020, *The Lancet* published an article containing a fresh analysis by scholars from the Institute for Health Metrics and Evaluation (IHME) that has challenged that thesis (Vollset *et al.*, 2020): according to the new model developed by the team of researchers, the world's population is expected to grow to reach 9.7 billion in 2064, at which point it will begin to decline. By 2100, the global population will stand at 8.8 billion, which is 2 billion lower than previously presumed. Perhaps the study's most interesting findings involve the projected distribution of the world's population: China, which currently ranks first with 1.4 billion people, will drop to third place by 2100, having been overtaken by India, with 1.09 billion people (which represents a decrease from the country's current 1.38 billion people), and Nigeria, with 791 million people (a major increase from its current 206 million). Sub-Saharan Africa as a whole is the only super-region whose population is not expected to decline during the next eight decades. Meanwhile, Europe – and within it, Poland – will continue to age (Eurostat, 2021b).

The value of studying old age in a concrete societal context

In order to more thoroughly investigate the interplay of ageing's many aspects, it is useful to ground a study of the experience of old age in a particular societal context. This volume focuses on the case of Poland, where an ageing population poses a crucial challenge for the state's social, family, and gerontological policy. The book investigates ageing among Poles from demographic, philosophical, legal, psychological, gerontological (medical), and sociological perspectives, with an emphasis on activities that can support older adults locally or nationwide. It proposes the development of a social policy and social attitudes that can facilitate changes in the social perception of ageing, along with a redistribution of resources for older adults.

Focusing on the current situation in Poland as a sort of societal 'case study' adds depth to what could otherwise become a highly abstract analysis of old age, and it helps keep it firmly grounded within a real-world context of older adults' lived experiences and of concrete local and national initiatives whose successes (and failures) can be examined. At the same time, by connecting the studied realities with phenomena that are ubiquitous throughout our contemporary world, the book will strive to elicit insights that can be of interest to scholars and policy-makers globally.

The realities of ageing and old age in Poland

The rise in the percentage of elderly people in Polish society is gaining momentum. By 2035, the share of persons aged 65+ will approach a quarter of the total population. The process of demographic ageing of the population is expected to be uneven, having a greater impact on reshaping the demographic structure of urban populations. According to a forecast by the Polish national statistical agency, Statistics Poland, there will be a significantly higher percentage of people aged 80+ in cities; this indicates a potential increase in the need to provide diverse forms of support to cities' oldest inhabitants.

For years, such demographic issues have been causing sleepless nights for Polish statisticians and labour market experts. In 2008–2018, the number of people aged 65+ in Poland was projected to increase by 3.6%, while the percentage of the population aged 14 and under decreased from 15.5% to 15.2% (GUS, 2009). While one of the greatest concerns expressed by ecological activists fighting for the welfare of the planet is that of overpopulation, Poland reflects a different reality: Polish society is ageing, and its overall population is shrinking.

The most important reasons for the increase in the percentage of elderly persons in society include (above all) the general extension of the duration of human life and the decreased number of births. The former factor is also contributing to an absolute increase in the number of elderly people. In Poland, the process of the demographic ageing of the society – which is reflected in the increased percentage of elderly persons – is characterized by

numerous discernible features that are important from the point of view of social policy. These include:

- **The ‘feminization’ of old age**, which is reflected in a numerical dominance of women that increases as one considers older adult subpopulations of increasingly elevated age. In Poland, the share of men in the total population of people aged 65 and over will gradually increase, but dramatic changes are not to be expected. A long-term projection prepared by Statistics Poland anticipated that from a figure of 38.7% in 2015, the percentage of persons over 65 who are men will rise to 39.7%, 40.4%, and 40.7% at the end of subsequent five-year periods, and by 2045, it will reach 40.9% (GUS, 2020i). Within the group of people aged 80 and over, the share of men will be much lower, rising from 30.7% in 2015 to 33.5% in 2035. The feminization of old age has important consequences for social policy – for example, relating to income policy (in Poland, women’s pensions are, on average, lower than men’s) and health policy (women’s self-assessment of their own health is generally worse than that of men of the same age).
- **‘ingularization’ in old age**, a phenomenon expressed in the high percentage of older adults living in single-person households. According to forecasts from Statistics Poland, in 2030 as many as 53.3% of single-person households will be run by people aged 65 and over, including 17.3% run by older adults aged 80 and over (GUS, 2020i). This will entail roughly 2.74 million persons aged 65+ living alone in their households, including about 887,000 persons aged 80+. Older adult women are considerably more often the members of such single-person households.
- **‘ouble ageing’**, reflected in a growing share of the population comprising persons aged 80+. Forecasts by Statistics Poland (GUS, 2009) have predicted that the percentage of people aged 65+ will systematically increase, reaching 23.2% by 2035 (24.3% in cities and 21.7% in rural areas). Much more dramatic will be the change in the percentage of the population aged 80+, which will more than double from 3.0% in 2010 to 7.2% in 2035. In 2010, this figure was 3.4% in urban areas and 3.6% in rural areas; by 2035, the figure in cities is expected to more than double, to 8.1%, while in rural areas it will reach 5.8%.
- **The increasing internal differentiation of old age**, which in Poland is manifested in dynamics like the spatial differentiation of the demographic ageing process. In 2035, the highest percentage of people aged 65+ is projected to be recorded in the country’s eastern (24.3%) and southwestern (24.2%) macroregions, while the largest share of people aged 80+ will be found in the southwestern (7.6%) and central (7.4%) macroregions. Other ways in which subgroups of elderly persons differ from one another relate to their state of health, level of education, place of residence, and family situation – all of which influence the tasks faced by those who make social policy (Błędowski *et al.*, 2012; Błędowski, 2002).

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Due to the relatively small number of persons outside of Poland who are familiar with the Polish language, it has traditionally been difficult for scholars around the world to gain insights in the area of old age, social care for the elderly, and death and dying in Poland (or, for similar reasons, in most other Eastern European countries). While bodies like the UN and WHO have published global assessments of ageing that include general statistics from Poland, these have been fairly superficial reports; the fact that most serious qualitative analysis of ageing, the social care system, and the effectiveness of public policy in Poland has been published in Polish has left it inaccessible to the majority of the world's researchers. It is hoped that through this volume's investigation of the kinds of issues noted above, the book can make available to English-speaking scholars new and richer bodies of data and analysis regarding the contemporary situation of the elderly in Poland.

Toward deeper reflection on old age

A remedy for the challenges of ageing societies might be found in the activities of social institutions, as understood in the sociological sense introduced by Herbert Spencer (1900). Such 'institutions' include stable elements of the social order (e.g., family, property, and law); regulated and sanctioned activities (e.g., science, education, and the judiciary); recognized ways of solving problems of cooperation and coexistence (e.g., marriage, divorce, loans, and arbitration); and some formal organizations that perform specific functions in society (e.g., hospitals, prisons, factories, and government offices).

This broad understanding of social institutions as corresponding to the societal order or to the fundamental economic and social systems that order rights and obligations and guarantee social justice (Rawls, 1971) can also be applied in various areas of support for the elderly. Institutions such as the family; social welfare institutions; self-organizing communities; and legal, economic, political, and educational systems play an invaluable role in creating the social order in which the place and social position of older adults are determined. It should be added that the elderly are not formally excluded from these institutions; on the contrary, the elderly constitute a core component of some such institutions. The challenge is to activate the full potential of the elderly within such existing institutions, in order to achieve effects that minimize the negative impacts of global ageing and that even make it possible to derive considerable social benefit from the phenomenon.

By reflecting on the social relations in which elderly persons function, as described in this volume, it becomes possible to formulate several general convictions about old age as a social phenomenon. First, old age touches all members of a given society – not only those who are already of retirement age but also those who will be old one day and who are currently actors in social relations with the elderly. As phenomena, old age and ageing are existential experiences and social issues of a universal character.

At the same time, though, any serious reflection on old age – especially as it relates to the end of life – is often powerfully suppressed within or displaced from our individual consciousness, which drives the emergence and maintenance of stereotypes and prejudices. This dynamic also enhances the more atavistic features of societies, such as the division into ‘our people’ and ‘strangers’ – where the boundaries delineating what is ‘ours’ and what is ‘alien’ may not neatly circumscribe a village, city, or country but run directly through a social group of persons living in close proximity to one another.

While elderly persons may sometimes be directly excluded by others from certain areas of social life, it is also quite common that – as a consequence of not feeling a sufficient level of support or acceptance – they more or less consciously auto-marginalize and exclude *themselves*. In this way, they exit the labour market, withdraw from social life, stop spending their time in active pursuits, and end their engagement in joint initiatives and social projects. They become deprived of equal access to goods and services and are discriminated against not only by other people and social groups but also by public institutions. They come to consider themselves to be ‘superfluous’ citizens who, weak and useless, are occupying someone else’s rightful place in the social order.

This undermines the social functioning of older adults and – together with objective factors related to the passage of time and deterioration of their health – creates a huge challenge for the organization of care systems and provision of effective care. Providing adequate informal and institutional care for older adults is a challenge faced by all societies that are experiencing the effects of their citizens’ ageing. This challenge is further complicated by the need to take into account the activity profiles of individual older person, which makes it difficult to fully adapt general social support systems to the needs of elderly persons.

Self-marginalization is additionally damaging because, through it, communities and societies lose access to the vast personal resources of older adults, as reflected in their life experience; wisdom; personal, professional, and relational competencies connected with their education, achievements, and creativity; and, above all, the grounding and stabilization that they provide at the emotional, mental, and family levels.

When thinking about some generic collection of elderly persons, one fact that can be taken for granted is that they will form a highly diverse group. Elderly people have different life experiences, levels of health, degrees of physical and mental fitness, family situations, attitudes toward life, educational backgrounds, financial situations, professional experiences, social lives, interests, needs, skills, ways of behaving, plans for the future, civic maturity, social relations, and approaches to existential matters, as reflected in their worldviews, religious beliefs, and spiritual lives. One could list many further factors that differentiate the population of people aged 60+, which only demonstrates that – contrary to the common perception of this

population as a fairly homogeneous group – the rich diversity of this oldest social group is immeasurable.

Breaking through stereotypical views about the elderly will lead one to realize the need for deeper reflection on how to build intergenerational relations, how to prepare for one's own old age, and how to actively use the time given to one in old age in a way that reflects one's personal preferences. These questions can all be broadly understood as elements of a 'prophylaxis' that seeks to prevent, mitigate, or transform potentially negative effects of old age.

Applying an interpretive sociological approach

The general theoretical context of considerations on old age presented in this publication is that of the paradigm of interpretive (or 'understanding') sociology, of which Burrell and Morgan (2016) provide a valuable description that situates it within its historical context and within the broader sphere of sociological theories. The interpretive paradigm captures a wide range of philosophical and sociological thought whose aim is to attempt to understand and explain the social world primarily from the viewpoint of those social actors who are directly involved in some social process. Its roots reach back to the German tradition of idealism and the sense that it is 'spirit' or an 'idea' – rather than data provided by sensory perception – that lies at the source of ultimate universal reality. Among the thinkers who contributed to the rise of positivist sociology and then the birth of contemporary interpretive thought might be Immanuel Kant, Georg Wilhelm Friedrich Hegel, Wilhelm Dilthey, Max Weber, and Edmund Husserl. Contemporary representatives of hermeneutic, interpretive, or understanding sociology include Alfred Schütz, Harold Garfinkel, Thomas Luckmann, Aaron Cicourel, and Charles Taylor.

The issue of interpretation in sociology has been raised in relation to the meaning of social actions that (unlike some other behaviours) require one to understand their subjective meaning. The problem of interpretation appears in all areas of culture – and especially wherever one encounters meanings embodied in symbolic forms that are discursive, iconic, or performative. This is an interdisciplinary matter, and the approaches to interpretation that have been formulated vary in their precision; depending on their emphasis, they may treat interpretation either as the application of a set of rules or as a more fluid art. In the case of sociology – where interpretation refers primarily to the meaning of social activities as activities of communication or symbolic interaction – there arose an attempt to develop so-called 'qualitative' research methods, understood in a broader sense than just anthropological or ethnographic field research. Interpretive sociology creates a space that serves as a home to various research approaches and that centres the research perspective around the vast creative potential of the researcher, who is given considerable autonomy but is simultaneously

charged with the responsibility of reflecting on his or her own role and engagement in the interpretive process.

The paradigm of interpretive sociology is mentioned here, in order to help the reader recognize those ways in which it will appear in later chapters in the book, interwoven into their analyses. More detailed references to particular ideas arising from interpretive sociology will be made in individual chapters; however, it is worth keeping the paradigm in mind as a framework that helps situate the entire publication in a broader theoretical context.²

An outline of the book's contents

This volume includes 18 chapters that investigate topics related to old age, understood as a social issue. Within the literature of the subject, the term 'old age' is often used as though it were synonymous with a social problem. Such a mindset arises naturally within the field of social policy in connection with its particular goals and tasks. The field is especially sensitive to social issues that pose a barrier within society that prevents it from achieving a state of full development and satisfying all the needs of its members. Social policy-makers thus see it as their role to minimize (or even eliminate) such social issues. Meanwhile, there is a separate trend of research and analysis in sociology that constitutes a sociology of social problems (Frysztacki, 2009). Today, the sources of problematic social issues are often sought in a given social order and in its imbalances. In seeking to identify and analyze such imbalances, an important role is played by theories of asymmetry, inequality, social contradictions, and failures of the social order (Leon-Guerrero, 2011; Macionis, 2010; Frysztacki, 2009; Auleytner, 2007; Rubington & Weinberg, 2003; Merton & Nisbet, 1971). The 'question of old age' is often presented as a social problem due to the following factors:

- the economic effects resulting from the increasing number of elderly (i.e., post-retirement-age) persons in relation to those of working age;
- the reduction in older adults' quality of life resulting from a poor state of health;
- the need to organize a formal care system (e.g., involving systemic solutions in the field of social assistance) to handle situations where informal care resources have been exhausted;
- reduced occupational experience and possibilities resulting from the technological progress of civilization and society's unfolding 'technicization' (which, for example, increases the risk of isolation of those without particular aptitudes);
- a relatively low level of education among older persons (at least for those generations born in the 1940s and 1950s);
- insufficient interest in and knowledge about ageing among members of younger generations; and

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- a stereotypical approach to older adults that shapes their social functioning.

The aspects of old age as a social issue noted above make this period of life challenging not only for individuals who will sooner or later enter old age but also for families, local communities, and, ultimately, national policy. The burdens relating to economics, assistance, medicine, and care constitute the greatest challenge for successful long-term planning relating to the labour market, pensions, families, and elderly policy.

This publication seeks to explore such wide-ranging implications of ageing in light of relevant dimensions of elderly persons' lives. From the starting point of an analysis of the scale of the phenomenon of ageing, the book moves to consider psychological problems related to marginalization, auto-marginalization, family situations, crises of care, and the experiences of workers in the helping professions who deal specifically with the problems of elderly persons – and then to investigate ways of building intergenerational relationships and developing activities that can prepare the members of each new generation to experience their own old age. The chapters cover a broad spectrum of issues relating to the diverse impacts of ageing and the challenges faced by older people. They also analyze and formulate proposals for addressing some of the negative effects on one's health and psychological and social well-being that are experienced later in life.

From the description above, a reader might get the sense that old age will be presented in this volume in a predominantly negative light. However, the book's aim is more complex. The intention is certainly to demonstrate the challenges of old age, which means emphasizing the scale and heterogeneity of particular threats relating to old age. But just as important is illustrating ways in which such obstacles can be overcome or eliminated – or, at a minimum, encouraging people to look for solutions. Treating old age solely as if it were an intractable scourge increases prejudices and powerlessness, which is counterproductive. This book has been written with a conviction that old age is in fact an extremely interesting, diverse, and, above all, dynamically changing period, because each subpopulation of older adults possesses different resources and needs. It can thus be said that the main goal of this publication is to explore gerontological issues in a manner that documents as completely as possible the limits to development experienced by the elderly, while simultaneously seeking to identify creative and effective remedies for them. It is certainly necessary to acknowledge and appreciate the positives of old age (of which the greatest is the vast diversity of resources possessed by elderly persons, in terms of their preferences, needs, knowledge, interests, state of health, level of activity, family environments, financial and professional situations, social circles, and ways of spending their free time), and further publications are being planned in which it will be possible to investigate these beneficial and rewarding aspects of old age in more detail.³ However, within this present volume, the perspective that

seeks to clearly define and analyze the multifaceted *challenges* of ageing will be especially critical.

The book organizes its investigation of these issues into four interrelated thematic parts. The first part, ‘Understanding ageing’, includes two chapters. Chapter 1, ‘Ageing within the context of a particular society: Polish older adults in numbers’, considers ways in which the concepts of ‘old age’ and ‘the elderly’ are defined demographically and provides up-to-date statistical data and trends regarding older persons in Poland (e.g., regarding their financial situation, state of health, need for care, living conditions, family situation, and ways of spending their free time). In Chapter 2 (‘Ageing research: methodological approaches to building gerontological knowledge’), the methods and techniques of old age research are briefly discussed, general recommendations for research on old age are presented, and an attempt is made to hermeneutically apply the category of ‘time’ as a means of describing research assumptions about the elderly. A better understanding of the concept of time can both suggest new directions for research and support the interpretation of findings.

The book’s second part explores ‘Specific challenges of old age: crisis, violence, exclusion, and death’. It focuses on liminal situations, problems of social exclusion, life crises, and the rights of the elderly in the face of such challenges. Chapter 3 (‘The social death of the elderly: reflections on double exclusion’) investigates the way in which elderly persons often undergo a sort of ‘social death’ by becoming excluded from public activities and family and social life – sometimes in a manner enforced by others, and sometimes through their own actions as a result of having absorbed stereotypes of how elderly persons are ‘supposed’ to behave. It also discusses approaches to diagnosing social exclusion. Chapter 4 (‘Being old: “they” or “we”? The social perception of ageing, conditioning, and the impacts on subjectivity’) investigates, among other things, the challenge of breaking down artificial, socially constructed barriers between ‘the elderly’ and other age groups and of helping younger generations to see themselves as the ‘future elderly’. Chapter 5 (‘Old age in crisis or the crises of old age? The social meaning of “crisis” interpretations of old age’) reviews and applies the diverse body of thought regarding the concept of ‘crisis’ to examine whether old age as a whole (or only certain events occurring within it) can be considered a sort of ‘crisis’ – and whether a crisis need be only a negative phenomenon or can have positive developmental aspects. In Chapter 6 (‘Rights of the elderly against social marginalization’), we explore the rights of elderly persons – as expressed most broadly in both international treaties and declarations and, more concretely, in Polish law – along with strategies for better defending them. Meanwhile, Chapter 7 (‘Awareness of mortality and successful ageing: a research communication’), presents and discusses the results of a study into Poles’ attitudes toward death, dying, and their own old age.

The book’s third part focuses on ‘Social support and the helping professions’. Chapter 8 (‘Gerontological social work: specifying its context,

definition, and challenges’) illustrates what ‘gerontological social work’ means within the broader context of social work and identifies unique aspects of its functioning. Beyond offering formal concepts and definitions, it considers the concrete case of Poland to see what such work looks like in practice. Chapter 9 (‘The role of the social worker in supporting the elderly: theory, practice, and postulates’) investigates the nature of social work as the realization of social policy (using Poland as an example) and discusses the ‘approach of self-determination’ as a proposed method for increasing the effectiveness of social work with older adults. Chapter 10 (‘The hermeneutics of loss and death in practical aid work for the elderly’) draws on a rich philosophical tradition to investigate how developing a more conscious personal understanding of death and dying – or a ‘hermeneutics of death’ – can benefit those who work with elderly persons and the elderly themselves. Chapter 11 (‘Social work in the face of death and dying’) explores the social meaning of death and dying, discusses the unique nature of social work that takes place in encounters with death and dying, and presents guidelines for research on social work in the context of death and dying. Chapter 12 (‘Addressing abuse of the elderly: recommendations for practice’) highlights the many dimensions of violence against the elderly – some of which are not obvious or widely discussed – and shows how development of a typology of violence against the elderly can aid with understanding this issue. Chapter 13 (‘In search of the activation of the elderly: streetworking with older adults’) explores potential use of the activity known as ‘streetworking’ (or the ‘pedagogy of the street’) as a means for positively engaging with older persons, a group to whom the activity has thus far only rarely been directed.

Finally, the volume’s fourth part focuses on ‘Older adults in the context of family and institutions’. Here Chapter 14 (‘Faces of intergenerational solidarity through the eyes of the younger generation: barriers, benefits, and prospects’) considers various theoretical views on the nature of solidarity; explores intergenerational solidarity as a type of social solidarity; and locates intergenerational solidarity in the context of other research. Chapter 15 (‘Social services for the older adult family: current state and prospects for development’) analyzes the nature of the contemporary older adults’ family in the context of family crisis and demographic change and considers the present state and likely future needs and developments in social services directed toward elderly. Chapter 16 (‘The older adult family within the space of a social assistance home: best practices’) considers social assistance homes for the elderly against the background of existing legal conditions in Poland; investigates the needs of older persons residing in social assistance homes and their families; and analyzes the social assistance home for the elderly in Staniątki, Poland, as a case study of emerging best practices. Chapter 17 (‘The Intergenerational Dialogue Centre as an initiative for building social capital without regard to age’) identifies a range of pressing intergenerational problems, considers ways in which the establishment of an ‘intergenerational dialogue centre’ can potentially address such problems,

and explores the concrete impacts of organizations and institutions recently created in Poland that can provide inspiration and models for such developments. Finally, Chapter 18 ('Education for old age: traditions, perspectives, and recommendations') reviews various approaches to education for the elderly, discusses the presumptions of education for old age, and presents a project of more effective education for old age.

Through the diverse chapters that follow, this book seeks to present and effectively synthesize a range of multidisciplinary perspectives and qualitative and quantitative research methodologies. It is hoped that almost all researchers who are interested in ageing and old age will recognize at least one chapter that speaks directly to their experience and favoured research methodologies – and that through the 'gateway' of that chapter, the volume might guide researchers to discover how their chosen discipline and methodologies can engage with other research approaches and bodies of knowledge, in pursuit of a deeper understanding of the complex issues of ageing and old age.

Notes

- 1 For the purposes of this introduction, the term 'old age' can be generally understood to refer to the state of life experienced by persons who are 60 years of age or older, which is consistent with the formal definition offered in Poland's Act on Elderly Persons of 11 September 2015 (2015). This is admittedly an imperfect and overly simplistic approach, as it only takes into account a person's recorded age, ignoring the equally important psychological, biological, economic, and social dimensions of age. However, it is helpful to adopt this preliminary formulation for use in our initial discussion of the phenomenon. Later in the book, the boundaries of old age will be considered in more detail, and more refined definitions will be presented.
- 2 Further analysis of the insights that interpretive sociology can offer on the subject of ageing is being developed in a forthcoming book on *Hermeneutyka starzenia się – ku społecznemu rozumieniu zjawiska* ('*The Hermeneutics of Aging: Toward a Social Understanding of the Phenomenon*') that is currently being prepared by this volume's author.
- 3 Among such publications are, for example, Garcia L., Łuszczynska, M., Jutai, J., & Bélanger-Hardy, L. (2021). *Well-being in older life: The notion of connected autonomy*, Routledge (manuscript in preparation).