CHAPTER 1

Introduction: Critical Perspectives in Social Gerontology

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This book is the product of our shared conviction that mainstream social gerontology has paid insufficient attention to the degree to which age and aging are socially constituted (Baars, 1991) and to the ways in which both age and aging are currently being transformed as a result of the set of social forces surrounding processes of globalization. The neglect of critical analysis has weakened attempts to understand the social processes involved in shaping age and the life course and, consequently, the creation of alternative conceptions and visions about the future of old age. This failure must itself be linked to general inadequacies of theory building within gerontology, a deficiency shared across both European and North American studies of aging (Bengtson & Schaie, 1999; Biggs, Lowenstein, & Hendricks, 2003; Birren & Bengtson, 1988; Lynott & Lynott, 1996).

Despite its explosive development over the last half-century, social gerontology has been characterized by an imbalance between the accumulation of data and the development of theory (Bengtson, Rice, & Johnson, 1999; Hendricks & Achenbaum, 1999; Riley & Riley, 1994). Researchers interested in aging have relentlessly collected mountains of data, often driven by narrowly defined, problem-based questions and with little attention to basic assumptions or larger theoretical issues. An absence of theoretical development is surely not surprising for a fairly young enterprise that seeks to capture a complex empirical reality; especially one that draws from many disciplines, and that is preoccupied with urgent practical problems (Hagestad & Dannefer, 2001). Yet the lack of attention to theory has meant that research questions have often been informed by an uncritical reliance on images and assumptions about aging drawn from popular culture or from traditions and paradigms of theory that are considered outdated

within the broader discourses of behavioral and social theory. When such assumptions are used to guide the formulation of research questions and research designs, the result can be what has been termed "dust-bowl empiricism" (Birren, 1988), unintended reductionisms or other fallacies that misspecify the level of analysis and, therefore, missed opportunities to pursue the most revealing aspects of the subject matter in question (Hendricks, 1999).

Yet without question, several major gerontological paradigms of the late 20th century have contributed fundamental insights to inform theoretical development. These include, for example, the principles underlying cohort analysis and the interplay of demographic and economic forces, which in turn reflect the importance of history and social structure. These paradigms have included age stratification (Riley, Johnson, & Foner, 1972), life-course theory (Elder, 1974), life-span development (Baltes, 1987), and the first paradigmatic source of critical gerontology, political economy (Estes, 1979; Minkler & Estes, 1999; Phillipson, 1982; Walker, 1980, 1981).

Although these important traditions of thought have contributed organizing principles that have become classic in their influence upon both theoretical and methodological questions, with the exception of political economy approaches they do not claim to provide specific theoretical guidance. Instead, they provide some bedrock elements that must be included in any adequate theory, such as the importance of cohort flow and cohort succession, the tension between agency and structure, and the complexities involved in the articulation of individual and social change.

Moreover, almost all of these approaches have been appropriately criticized for their lack of attention to the actual experience of aging. By definition, such approaches give little attention to interpretive phenomena, such as the rich and complex fields of experience, consciousness, and action (Gubrium, 1993). As human phenomena, both age and aging are, by definition, experiences that are laden with meaning, and it is now understood that the dynamics surrounding the interpretation of events can have powerful effects on health and physiology (Ryff & Marshall, 1999). Yet many research traditions focused at the individual level are also problematic. First, some popular conventional approaches, such as exchange theory (Bernheim, Schleifer, & Summers, 1985; see Bengtson, Parrott, & Burgess, 1997), rational choice theory (Cromwell, Olson, & Avary, 1991), or socioemotional selectivity theory (e.g., Carstensen, Fung, & Charles, 2003), deal with meaning only in within narrowly formulated terms.

Second is research in the psychodynamic and psychoanalytic traditions. Much of this work deals more directly with experience and meaning, psychodynamic and psychoanalytic traditions. Much of this work deals with experience and meaning, but with a universalizing impulse that forces data into prefigured categories and patterns. Such approaches include Tornstam's (1996) exploration of gerotranscendence as a form of personal integration and Levinson's (1994) theories of adult development. Such approaches do justice neither to the complexities of data on the

one side nor to the range of outcomes found under diverse social conditions on the other (Dannefer, 1984; Morss, 1995).

In response to such approaches, a third set of analyses have sought to make the diversity of experience and the contingency and uncertainty of meaning—phenomena that are closely allied with the theme of social change—into integral parts of theory. These include narrative approaches (Gubrium, 1993), work in the "risk society" tradition (Beck, 1992; O'Rand, 2000) and the related "postmodern" or "poststructural" accounts (Gilleard & Higgs, 2000; Gubrium & Holstein, 2002). These approaches seek to draw on humanistic and critical elements in social theory that have rightly been viewed as missing from the mainstream contemporary discourse in social gerontology (Cole, 1993).

Thus, in contrast to the traditional lament of a dearth of theory, social gerontology is now courted by numerous theoretical suitors. Despite the valuable and often provocative insights generated by each of these perspectives, our shared conviction is that none of these approaches, taken alone, provides an adequate paradigm or conceptual basis for theorizing aging.

This is the case, even though some of these approaches have effectively identified the limitations of others. For example, the discovery of cohort analysis (Riley et al., 1972; Ryder, 1965; Schaie, 1965) and cross-cultural studies of physiological, psychological, and social aspects of development and aging (e.g., Fry, 1999; Rogoff, 2003) revealed that individuals who live under different conditions develop and "age differently" (e.g., Maddox, 1987; Rowe & Kahn 1998). More than that, however, "age stratification" (Riley & Riley, 1994) and related traditions made clear that age is a feature not just of individuals, but of social organization. Age is used politically and bureaucratically as a principle of social organization and social control. Age is also a feature of culture, carrying the force of meaning and power back into the minds and bodies of citizens. When such forces are recognized, it becomes clear that age-related outcomes are, thus, not mere consequences of organismic aging, but of complex interrelations that combine social structural, cultural, and interactional processes.

In this situation, it becomes clear that it is indeed a premature closure of inquiry to accept the widely popular assumption that chronological age reflects natural, organismic changes that can therefore be the basis for the search for a general theory of human aging (Baars, 1997, 2000). This is a form of naturalization and, as with most instances of naturalization, it is also ideological because it hides from view the role of political power in structuring age-related outcomes. As a familiar example, consider the reasoning used by those working in the tradition of disengagement theory (Cumming & Henry, 1961). It is a curious logic that discovers that individuals post-65 are socially disengaged and decides that this is indicative of human nature, while ignoring the fact that their study population lived under a social regime in which age-graded retirement was a social institution. Such analyses always, and necessarily, eclipse the role of institutional power, assuming that it is nothing but an accommodation to the natural inclinations of

the body. Because it deflects attention away from the importance of social and political forces, naturalization can serve as a form of *legitimation* of a social order. Indeed, it can be a particularly strong form of legitimation since it renders social forces and their explanatory potentials completely invisible. One notable feature of such models is the absence of attention to the importance of power in social relationships, or power differentials between individual and society. In this model, individuals are assumed to be largely predetermined and fixed in their nature, characteristics, and developmental possibilities; the roles of power, private interest, and ideology are eclipsed or sidelined (Dannefer, 1984, 1999).

While the importance of social forces in the constitution of aging can be glimpsed through cohort and cross-cultural studies, these approaches by themselves do not provide an analysis of the actual face-to-face processes through which both individual selves and cultural meanings are constituted and sustained. Such mechanisms have been described by work in the interactionist (Kuypers & Bengtson, 1984) and constructivist (Gubrium & Holstein, 2002; Gubrium & Wallace, 1990) traditions of sociology. In addition, the related meaning-focused analyses of other scholars from several disciplines (e.g., Cole, 1993; Kenyon, Birren, & Schroots, 1991; Marshall & Tindale, 1978; Moody, 1996). Some of this work demonstrated the potentials of analyzing micro-interaction and self-processes, and in so doing offered an implicit and occasionally explicit critique of quantitatively based approaches. Some would claim that such perspectives are, paradoxically, the most rigorous in their methodology and in their approach to empirical data, even though they are typically nonquantitative. The first task of science, Herbert Blumer proposed, is "to respect the nature of its subject matter" (1969, p. 44).

Such approaches thus stand as powerful critics of both the psychologistic and the conventional quantitatively oriented social science. Yet these approaches themselves are characterized by at least two important problems. The highly descriptive microfocus, welcome as it is, entails a risk of microfication (Hagestad & Dannefer, 2001). This has two sources. First, work in the constructivist and humanistic traditions typically *substitutes* microsocial or narrative analysis for macroanalysis, rather than seeking to conjoin the micro and macro. This practice ignores the degree to which microprocesses are shaped by macrolevel forces that are beyond the control and often beyond the sphere of knowledge of the experienced realities of everyday life. Second, related to the first, is the neglect of the centrally important reality of power. Key to understanding both individual aging and the development of age, as a property of social systems is a recognition of the centrality of power. Power is at work in determining, for example, which ideologies of age become accepted within popular or scientific discourse and which individuals have the best odds to "age successfully."

An adequate understanding of human aging requires the contributions of all the various approaches described above, despite their limitations. It requires a recognition of the importance of cohort analysis, cross-cultural and historical

analysis, and it requires serious attention to processes of meaning construction and self-constitution at the microlevel of face-to-face interaction.

We share the conviction that it also requires more. It requires a recognition of how social forces operate at the macrolevel to shape the microlevel of everyday experience; of how legitimating ideologies are enacted at that microlevel to reproduce the larger institutional patterns or are occasionally resisted in ways that challenge and transform the larger institutional patterns. Such analyses make explicit the need to attend to connections between micro and macro and to the reality that power is always at play in those interrelationships and in the ongoing processes that occur at both micro- and macrolevels. These assertions represent some of the key insights of critical theory, the second paradigmatic source of critical gerontology. They are built upon contributions of other theoretical efforts in social gerontology, but go significantly beyond them.

DEVELOPING CRITICAL GERONTOLOGY

These key principles of critical gerontology are informed and enriched by foundational work in the related fields of the sociology of aging (e.g., Riley et al., 1972), the demography (Ryder, 1965; Uhlenberg, 1978), anthropology (Fry, 1999; Keith, 1982; Sokolovsky, 1990), and political economy of aging (Minkler & Estes, 1984; Phillipson & Walker, 1986). Taken together, these bodies of work have made unmistakable the fundamental importance of the social in understanding human aging. As result of this work, an opening was created for analyses that begin to comprehend aging in terms that include power, ideology, and stratification, and the expanding global reach of such forces. This book is devoted to a detailed assessment of work in this tradition. Its development can be traced to symposia exploring aspects of critical gerontology, organized at conferences in Europe and the United States in the late 1990s. The editors have brought together a range of papers first presented at these events, as well as commissioning new contributions to provide a detailed overview of current work in the broad area of critical gerontology.

This book is divided into three sections, each of which deals with key issues and concerns behind the development of critical gerontology. Each section reflects a number of forces driving debates within the discipline. First, from the mid-1990s onwards, social and political science started to analyze the impact of globalization, notably in terms of the changing role of the nation-state, the accelerated movement of people across the globe, and the rise of transnational organizations and agencies (Urry, 2000). In general terms, debates about globalization have focused on issues such as the ecological crisis, the power of multinational corporations, problems of debt repayment, and related concerns. All of these affect the lives of older people to a substantial degree. Yet as a group they have been treated as marginal to critiques of globalization and related forms of structural change. But the paradox for older as well as younger generations is that

the macrolevel has become more rather than less important as a factor influencing daily life. Indeed, one might argue that while social theory in gerontology has retreated from the analysis of social institutions, the phenomenon of globalization (as ideology and process, and struggles around both) has transformed the terms of the debate. Even in the case of political economy perspectives, which continue to focus on structural issues, globalization has re-ordered the concepts typically used by researchers. Ideas associated with society, the state, gender, social class, and ethnicity have retained their importance; but their collective and individual meaning is substantially different in the context of the influence of global actors and institutions (Bauman, 1998). We see it as an important task of this book to take forward the analysis of globalization in the field of aging. All three sections of the book cover this area in different ways and at complementary levels of analysis.

A second influence running throughout the book concerns the various strands connected with the socially constructed nature of later life. This was an early theme in critical gerontology, with a variety of researchers exploring the extent to which social, biomedical, cultural, and economic forms contributed to the identity and status of older people (Minkler & Estes, 1991). In an early development of this approach, Estes (1979) summarized the "social construction of reality perspective" in old age as follows:

> The experience of old age is dependent in large part upon how others react to the aged; that is, social context and cultural meanings are important. Meanings are crucial in influencing how growing old is experienced by the aging in any given society: these meanings are shaped through interaction of the aged with the individuals, organizations, and institutions that comprise the social context. Social context, however, incorporates not only situational events and interactional opportunities but also structural constraints that limit the range of possible interaction and the degree of understanding, reinforcing certain lines of action while barring others. (p. 14)

The idea of aging as a "social construction" is taken forward in a variety of ways in all of the chapters: from the standpoint of political economy on the one side, to that of bio-medicalization on the other. A further concern of many of the contributors (notably in Section 2) is the examination of various discourses associated with the concept of age: first, in ideas about "functional age"; second, in attempts to reverse aging associated with the rise of the anti-aging industry; third, in the dominance of biological models in ordering debates about the nature of disease in later life.

A third major dimension of this book concerns debates about the nature of inequality in later life. This has been an explicit theme of research focusing on the impact of cumulative advantage and disadvantage over the life course, further reinforced by studies on the theme of social and cultural diversity in old age. Biggs and Daatland (2004) summarize this area of work as follows:

> That there are more older adults around than at any time in history is now well known. It is less well understood that, as the population ages, it becomes more diverse. In part, this is because individuals have had time to develop a more integrated and particular sense of self; in other words, who they believe themselves to be. Additionally, we are exposed to many more cultural pathways than preceding generations, making life appear richer and with substantially more options than has traditionally been the case. Diversity is also a consequence, however, of cumulative inequalities that have been accrued across a lifetime and now accentuate difference in later life. Each of these trends contributes to a widening variety of experiences of aging in contemporary societies—for good or bad. (p. 1)

Section 3 of the book explores the issue of inequality in greater depth, with contributors exploring aspects of cumulative advantage/disadvantage at local, national, and global levels, drawing on a mix of quantitative and qualitative data.

SECTION 1: Dimensions of Critical Gerontology

In Chapter 2, Jan Baars clears the ground for macrolevel theorizing in critical gerontology by dissecting the most common global descriptions of the changes taking place in contemporary society: late modern society, risk society, neo-modernism (neoliberalism), antimodernism, and postmodernism. He proposes instead "reflexive modernization" as a more appropriate term to characterize the present stage of development, which is a form of modernity and is aware both of its own limitations and trying to confront its pressing problems. He distances this idea from that of Beck's (1992) theory of reflexivity chiefly because, like Giddens' (1999) parallel theory, it leads to the individualization of social inequality and its rejection as a primary subject of research and policy. Baars argues for a fundamental reassessment of three key modernist ideas: responsible individual fulfillment, solidarity, and human dignity. The chapter ends with a call for a combination of structural and narrative scientific approaches, each with its unique contribution, into a research agenda focused on the social distribution of risks as life chances across the life course.

In Chapter 3, Chris Phillipson maintains the macrosocial focus by considering the challenges raised by the growth of globalization. He argues that globalization has precluded a distinctive stage in the history of aging by creating tensions between policies promoted by nation-states in response to demographic change and those formulated by global actors and institutions. In effect, the locus of power with regard to welfare is being shifted from local and national arenas to global ones. The chapter examines how globalization has challenged the essentially national accounts of critical gerontology and demanded an increasingly broader compass. Specifically, it considers three ways in which the "radical" view of globalization may be applied to understanding aging and older people:

its ideological influence on the social construction of aging; the particular construction of aging as a new form of risk; and its role as a driver of global inequalities in aging. The chapter concludes by calling for a new politics of old age that attempts to unite diverse networks of power and action, including feminism, black and ethnic minority groups, and transnational movements.

Alan Walker starts Chapter 4 with a retrospective review of the political economy strand of critical gerontology and continues with a focus on the relationship between social policy and aging. Walker charts the changing social construction of the relationship between old age and the welfare state over the second half of the last century. He takes issue with the criticism of a structural myopia in political economy analyses and argues that agency is not neglected. The political economy of aging was developed to rebut the previously simplistic, mainly functionalist, accounts that characterized aging as either an inevitable period of decline or as a stage of human development separate from the rest of the life course. By placing the spotlight on the social structure, it emphasized sources of inequality in old age and that remains a major aspect of its legacy. The chapter uses the "cultures of aging" thesis to illustrate the shortcomings of microsociological perspectives when compared to structural ones and, especially, highlights their acquiescence in the growth of inequality and the individualization of risk. The final part of the chapter draws on recent European theorizing on social quality to show how *both* structure and agency may interact across the life course and to emphasize the crucial role of the welfare state in enabling individual and collective agency.

In Chapter 5, Carroll Estes provides a critical feminist perspective on the issue of women's vulnerability and dependency through the life course. The first part of her chapter explores the role of the state in influencing the life chances of older women, a theme she examines in the context of various feminist theories of state and class relations. The chapter goes on to provide an analysis of the role of ideology in the construction of gender relations, especially in relation to patriarchy and the role of neoconservatism in the struggle to subjugate women. Estes brings these themes together in her discussion of globalization, with a particular focus on the rise of neoliberal, market-based policies, which reduce protection for women in vital health and social policy arenas.

In Chapter 6, Dale Dannefer considers some of the dynamics involved in the application of critical theory to gerontology. He suggests ways in which critical ideas have sometimes been co-opted by gerontology. He also argues that in less obvious ways, the ready application of critical theory to gerontology has been an occasion for those working in the critical tradition to avoid the profound and existential issues of human development, human aging, and human mortality that are ultimately generated by the topic of age—a reciprocal co-optation. The latter, involving coming to terms with morbidity and mortality even after ameliorative

efforts have been applied, is the greater challenge for critical theory, and Dannefer suggests a possible avenue for beginning to confront that challenge.

SECTION 2: Critical Dimensions of Medicalization: Aging and Health as Cultural Products

Chapter 7 follows as Stephen Katz builds upon earlier research that has looked at the genealogy of concepts used in the discipline of social gerontology. In this chapter, he asks why the term "functional age" and its correlate, "functional health," have become widespread within studies of aging. He provides a valuable historical survey of this cluster of ideas, highlighting milestones in both theoretical debates and empirical surveys. Katz draws the conclusion that the move from "chronological" to "functional" notions of age may be seen as signaling the need to establish measurable states of being, reinforced through neoliberal health mandates around self-care and independence. He concludes that critical gerontology faces the important task of questioning the extent to which "functionality" has emerged as a dominant way of understanding the aging process.

In Chapter 8, Neil King and Toni Calasanti examine the competing discourses provided by critical gerontology and the anti-aging industry on the theme of empowering older people. The former focuses on reframing dependency in old age as a social construction, underpinned by the social relations of capitalism and the market economy; the latter placing emphasis on activity and consumerism, with the possibility of older people reversing age-related dysfunctions and disorders. The authors observe how both approaches are located in the political economy of the Global North, this often accompanied by a failure to acknowledge the stark inequalities experienced by those in the Global South. In the second half of the chapter, Calasanti and King provide a detailed analysis of debates on the theme of empowerment, noting connections between critical gerontology and the anti-aging model, while pointing to fresh areas of debate in which each will need to engage.

In Chapter 9, Kathryn Douthit picks up the medicalization strand in the social construction debate, applying this to the field of psychiatry and its treatment of dementia of the Alzheimer's type. Her critique focuses on the uncritical acceptance (within and beyond the psychiatric establishment) of biopsychiatry and its privileging of time-efficient, instrumental therapies. Douthit illustrates this through a detailed analysis of the *Diagnostic and Statistical Manual of Mental Disorders* (*DSM*), confirming the extent to which medical/biological approaches have become embedded within psychiatry. She goes on to consider the impact of biomedicalization on approaches to

Alzheimer's disease, pointing to the failure to acknowledge the loss of self-esteem, the impact of anxiety and depression, and the need for support among such patients.

SECTION 3: Age and Inequality: Local, National, and Global Dynamics

In Chapter 10, Larry Polivka and Charles F. Longino, Jr. examine what they term as "the emerging postmodern culture of aging." The chapter begins with a discussion of the decline in traditional values and certainties along with the growth of new forms of individual autonomy and reflexivity. Then, among a range of postmodern analyses, they emphasize the significance of the neoliberal version that favors privatization of the welfare state. Polivka and Longino contrast the neoliberal "cultures of aging" thesis—that most older people are now affluent and that an even greater majority will be so in the future—with evidence about the socioeconomic status of retirees in the United States. For example, more than two-thirds of all retirees depend on Social Security for at least 50% of their income, 75% for women and 77% for minority ethnic groups. With regard to the next generation of older people, the evidence suggests that most retirees over the next 30 years will not be substantially better off than their parents. The final section of the chapter considers whether there is an alternative to the neoliberal path toward a viable postmodern old age. The answer, they argue, lies in a new narrative for social policy that stresses empowerment and is designed to create both security and freedom. Reflecting the political economy strand of critical gerontology, the authors reject privatization, given the substantial risks when applied to the field of social welfare.

Chapters 11 and 12 expand on the theme, anticipated in some of the earlier chapters, of cumulative advantage/disadvantage (Crystal & Shea, 2002; Dannefer, 2003). In Chapter 11, Stephen Crystal combines a newly elaborated cumulative advantage model with disablement theory to explore the interaction between health status and economic resources over the life course. He makes the case for the importance of midlife for understanding the precursors to late-life economic and health status. He points out that the consequences of differences in socio-economic status in health become more marked in midlife following decades of exposure to differential stresses and risks. Crystal goes on to provide an analysis of the factors shaping later-life inequality. He concludes by laying out a conceptual model for understanding health inequality, disablement, and cumulate advantage over the life course.

In Chapter 12, Linda M. Burton and Keith E. Whitfield explore another dimension to the cumulative advantage/disadvantage theme, focusing on the health experiences of low-income families. They explore the extent to which lifetime poverty affects a range of social, psychological, and economic domains, with profound consequences for physical and mental health status. The authors report

findings from a pioneering longitudinal, ethnographic study of multigenerational families, exploring two main questions: first, how is "cumulative disadvantage" experienced in daily life? Second, how are these disadvantages evidenced in family comorbidity? They emphasize a number of important findings for future research and policy, drawing out the high incidence of chronic physical and mental health problems experienced by mothers and their children. They note the cumulative effects of the early onset of certain diseases that lead on to chronic morbidity in middle and later life.

In Chapter 13, Sandra Torres returns directly to the theme of globalization, but focuses on its implications for studies of culture, migration, and aging. She is especially concerned with applying some of the concepts from the globalization debate to aging members of minority groups. Torres emphasizes the growth in the number of international migrants and the emergence of what has been termed "transnational communities." The chapter examines the implications of transnationalism for understanding both the nature of the migrant experience and the policies that need to be developed on their behalf. Torres also brings out the contradictory nature of globalization as an economic and social process. Drawing parallels with an earlier debate on gerontology around modernization theory, she highlights both the inequalities and the potential benefits that migration can bring for some groups.

Chapter 14 concludes this book with John A. Vincent's broad overview of demographic change. He employs macrocritical theory in order to understand population movements. The chapter opens with a summary of political-economy theories of population and a critique of their limited macrolevel vision and failure to account for rapid technological change. The main part of the chapter concentrates on pension-fund capitalism as a political economy that, in the last two decades of the 20th century, has become a central component of global capital markets. Drawing on the literature on "grey capitalism," the chapter demonstrates the enormous power wielded by its institutions in a largely private, undemocratic way. Vincent describes the ways that the ideology of pension-fund capitalism are reflected in the policies of a range of global organizations and agencies. He concludes with a detailed assessment of the basis for a political-economy perspective regarding demography and the operation of pension funds.

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