A RecomMendation letter

for local community authorities

IN PORTUGAL

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**Part 1: The Description of regional staTE of the socio-cultural and economic conditions based on the data**

Portuguese researchers, social workers and educators have been showing a growing interest on ageing processes over the last decades. Within the academia, there is a strong movement towards an ecological perspective deeply influenced by psycho-gerontology. In this regard we can trace a number of investigations on global ageing processes (Fonseca & Paúl, 2006; Ribeiro & Paúl, 2012), social networks and loneliness (Paúl and Ribeiro, 2009), loneliness and disability (Paúl, Ayes, and Ebrahim, 2006), among other issues. A sociological approach to ageing is also increasing its influence and covering various themes, such as care and carers (São José, 2012), active ageing (e.g. Gil, 2007; Machado, 2007; Quaresma, 2007; Villaverde Cabral et al, 2013), or the multiple connections of ageing and work (e.g. Vicente, 2007). The ones who study education and learning later in life are fewer. Still we find investigation focused on learning and well-being (Machado & Medina, 2011), or the transitions from paid work to retirement (Veloso, 2011a, 2011b). There is a strong movement, in Portugal, on universities of third age or similar (joining all different types and natures, about 500 in Portugal). However, we have motives to think (Veloso, 2011a) that there is a predominance of middle-class women in these learning spaces – a pattern already known in other European countries (Findsen & Formosa, 2011). Universities of the third age are therefore an excellent opportunity – but men generally fail to participate in its activities. Finally, we have reasons to believe that much of what is going on regarding men’s learning takes place in public spaces in the community. However, this learning does not seem to be formal or structured. Quite the contrary, it seems to be mostly informal, hands-on and very different in the relational aspects of learning. Previous research (Fragoso et al, 2014; Fragoso & Formosa, 2014; Ricardo et al, 2014), although merely exploratory, give us signs that it is a phenomenon that deserves our attention.

Despite the diversity of worries depicted in the academic research, the mainstream scenario in the community settings is simpler to characterize, at least roughly. The factors that determine, in our opinion, the most important dimensions regarding the social world of older adults in Portugal, are presently:

- The intensity of the ageing processes;

- the existence of an impoverished generation of older adults in our country;

- the absence of social policies that allow community to be the centre of the resolution of the problems of older adults; and almost all national policies tends to promote simple assistance and institutionalisation (Paulos & Fragoso, 2017).

These factors lead to three dominant sites that seem key in the social world of older adults. These correspond to spaces with a potential importance regarding education and learning – very clear in the Algarve region, where our research is being developed.

1) Care institutions: including residential homes, day care services, domiciliary services, either private or public funded. Although some of them might include programmes for the occupation of time and learning activities, this is not the general rule. Moreover, the average age of the older adults who use these services is increasing, with the consequent growth of problems of dementia or other types of limitations that constraints the autonomy and independence of adults. However, these institutions are fundamental to the survival of the impoverished generation we have in the region.

2) Learning institutions: the typical case being “universities of third age”, different in nature, activity, dynamism, etc. Third sector institutions manage the majority of these educational spaces; however, some are promoted and funded by local administration. Men are a minority in most of these spaces.

3) Community informal learning sites: include a huge set of clubs, associations, and even some informal groups. Hard to typify, but important in the sense that, generally, men participate more in these non-structured activities.

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**Part 2: The DESCRIPTION of THE community** in the BACKGROUND OF Local STRONG AND WEAK results/achievements

In this project, we interviewed older men from three towns/villages: Faro and Olhão (costal urban areas) and São Brás de Alportel (inland, mountainous, rural area). Faro is a municipality with 64 560 residents in 2011 (PORDATA, 2017) and is the capital of the district, in the region of Algarve. Faro lives mainly from services and concentrates the bigger employers of the region (like the Hospital, or the airport). The city is close to Olhão, with 45 396 inhabitants (INE, 2017), which includes a fishing port/ community, thus being very different from Faro in terms of cultural identity (among other differences). São Brás de Alportel is a municipality north to the city of Faro, whose population was, in 2011, of 10 662. São Brás is a small urban space but most of the municipality includes a mountainous rural area. It is a very different space, geographically and socially. In a considerable area the population lives isolated, fragmented in places that grew around small rural property and lacking basic services. People have to go to São Brás to access most services and culture. Infrastructures and public transportations are deficient. These rural areas are heavily aged. We conducted three non-structured focus groups discussions, one in each area. The findings that follow express a joint analysis of our data:

The immense heterogeneity among older adults makes the work of analysis difficult. However, commonalities between the older men become relevant when we look at their academic background. This led us to define three basic groups:

**1) Older men living in urban areas, very low educational background:**

This group includes men with four years or less of schooling (some of them illiterate). Most of them started to work at a very young age (between 8 and 10 years of age) as blue-collar/manual workers (e.g. construction, factories, and shoemaker), fishermen, long-distance driver, sellers and waiters. Some participated often in the informal economy. Although some kept a core continuous activity along their professional lives, other had a history of changing from a non-qualified position to the next one. It is very rare that we find someone in this group possessing a driver’s license or a car – bicycles are more common. Not all have TV. They never used computers or other digital devices apart from the mobile phone: but not all possess a mobile phone and the ones who do make a basic use of it. Some of them are working because they need it to survive: the values of their pensions are dramatically low. Some of these men live in precarious conditions or even in poverty; some of them do not have enough nor even to eat – they go to day-care centres, or similar institutions, to get two meals a day.

If men in this group have serious health problems, this triggers a biographical turning point: health problems can be the cause of an earlier retirement that further deeps their poverty; or reduce physical and social activity dramatically.

Their transitions to retirement, when happened, were generally problematic, due to multiple causes. The first refer to financial problems and the loss of income. Low-qualified jobs or working informally produces very low pensions. A minority gets financial help from relatives, children, brothers or sisters. For those who are widowers, the death of the spouse meant a traumatic event that led to severe depression and, in some cases, to suicidal thoughts. Brothers and sisters, for those who were childlessness, were very important in the grieving process, helping them to cope with this new reality. Social networks tend to be small in dimension and unsatisfying. Most of them talked about feelings of loneliness. When asked about how they coped with those moments, they answered that they watched TV, listened to the radio, read a book, went for a walk or phoned to friends. With few friends, financial problems that had impact in their social life, or lack of mobility, it is not surprising that those men feel lonely sometimes. Relationships with neighbours do not solve the problem: although they all stated to have good relationships with their neighbours, those were not close relationships. Community live from the past is thus remembered with nostalgia.

There is a minority, however, that showed to experience successful transitions. Those who talked about successful retirement transitions kept a professional activity or spent more time practicing hobbies that they already had, like, for instance, fishing. Socializing with people of the same age or younger persons is an important activity for the men interviewed. Those who do not have mobility issues go almost daily to a coffee shop or to a public space (e.g. garden) were they gather with friends, talk about soccer, community life or the news. Sometimes they play games, cards or snooker.

It is very clear that none of these men has a regular intellectual activity, nor engages in post-retirement learning activities. Although some of them participated in associations when younger, nowadays they were not active. The same pattern is obvious regarding physical activity. The only noticeable activity is socialising, usually in neighbourhood coffee shops, or public spaces in the community. It seems natural that this group of men does not shows the will to participate in learning. Their only suggestions go to the need to have appropriate places to socialize, or places with free open cultural activity, stressing that those places should be opened to everybody, regardless of their age or gender. Only a small minority thinks it makes sense to have activities for men only.

**2) Older men living in rural areas, low 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 diverse ways. They live in a mountainous area, characterised by a strong isolation and fragmentation. Most live in small clusters of houses that grew around rural property. Neighbours are just a few. All services are some kilometres away, only accessible with a car, because public transportations are rare (there is a bus once a week). Most of these men worked as subsistence farmers or manual workers. A few performed technical jobs and a high percentage of them worked for the city hall – the main employer in the area. Only a minority use computers, but all of them use mobile phones.

It makes no sense to talk about transitions to retirement. Either they are farmers and hence never retire (they keep a daily routine of working in the fields); or when they retire they find something to do in small farming places. So the main activity they keep is physical activity (farming and related activities in the rural world), but no cognitive activity at all. Socialisation is a problem due to isolation. They would like to have closer contacts with their families, but they are usually away or emigrated. They can contact daily with neighbours, but conflicts with neighbours are common and can mean step further in isolation. It is only natural that their social networks are small in dimension and nor rewarding up to problematic. There are very few or none cultural opportunities. Socialisation opportunities can be kilometres away and mobility can be a barrier. These men consider that the main problems faced by the elderly are: health problems and access to public health, lack of places to socialise, lack of cultural events and loneliness.

There is a very low level of participation in activities/ learning/ associations, mostly motivated by its inexistence and difficulties in transports or mobility. Gender roles are traditional and generational, but an evolution is noticeable. Although gender roles are traditional and based in male dominance, older men state that roles that are equalitarian would be fairer and point to the new generations as free from ancient unfair divisions. Their belonging feelings to the community and identity are strong and based in the idea that, culturally, the mountainous areas are different from the coastal cities. Nevertheless, is an identity of despair: they believe there is no future in northern Algarve – almost a human desert today.

**3) Older men living in urban areas, medium/high academic background**

This group includes men aged from 60 to 77 years old, whose educational level goes from 9/12 years of schooling, until tertiary degrees. The professional trajectories in this group are very diverse, but some of them had professions with high incomes and high social status. Even so, professions in this group are quite diverse: fireman, salesman, croupier, technicians (in the airport, public organizations, etc.), teachers, individual entrepreneur, and higher education teacher, among others.

The majority lived transitions to retirement successfully and live today a life with quality. The majority of men are financially and emotionally independent and autonomous. There are a few cases in which health problems have hastened the decision to retire and compromise life quality. Some need to help relatives, mostly because of health problems and mobility constraints. There also those who help their families financially.

Social networks in this group tend to be bigger in dimension and diverse in the type of contacts it includes. This type of social networks allows them to have people with who they can rely on when they need. The possibilities of getting or providing social support are, thus, bigger than in the other groups of men. Family is of outmost importance to most of the men.

Some men care about the community problems and do an effort to have some kind of intervention. There is a small group who share an interesting commonality: they were very active in political terms, in community intervention and sports, after the Portuguese revolution. They joined the many spontaneous movements that popped-up during that historical moment and contribute, in some way, to print some changes in the community in various domains of social life. Some of these men kept their communitarian activity during some years. Also interestingly, it is not the case today. After they retired, these men keep active in socialising, meeting everyday with friends and some are still very critical in political terms. But their present activity is much more devoted to live their own live and to socialize within a network of long-term friends, than to dedicate to community. In terms of social capital, it seems they have substituted, after retirement, bridging social capital, by bonding social capital. That is, they tend to concentrate and give attention in relational terms to their families (and specifically, to their wives) and close friends they were able to kept from “the older days”. This bonding social capital seems to be rewarding.

Regarding gender roles, these men reveal a conservative way of thinking about these differences in the past years and others demonstrated clearly that they are a little chauvinist. Some preconception is still present in some cases.

The results of the **focus group debates** yield a complementary view in relation to those of men. The participants belong to a wide range of third sector organisations (from care institutions to cultural groups of diverse natures) and local administration. Some synthetic conclusion from the two focus groups that gathered participants from Faro and Olhão are the following:

1. There seems to be an impoverished, low literacy generation that suffers from a wide range of problems, corresponding to the older adult with more than 80 years old, that presently live in a terrible dependency of care. However, participants think that the generations that will come after will be different, for example in their attitudes towards learning and the importance of keeping a high level of activity to improve their life quality. This view corroborates our interpretation of the men’s interviewees – see group 1 above.
2. There is a noticeable lack of answers to tackle the problems of mental health: the numbers of aged population in care institutions implicates the increase of people suffering from dementias, for example. Presently there are no enough resources – human, technical, etc. – to deal with the situation and help the families of these older adults.
3. If looking globally to the territories at stake – Faro/ Olhão urban areas – our participants consider that the existent activities/ opportunities in education, learning, sports and culture is more than enough. At the same time, they are aware that the information on these opportunities and its dissemination is deficient; and there are problems in organisation and networking. In this sense, it is needed a better cooperation between all the institutions that worry about older adults. Other institutions – like health or security services – or groups of persons – like informal carers – need to be included in these networks to consolidate.
4. Retired men are depicted as passive, when compared to women. For the participants retired women engage better in different kind of activities (learning or recreational), whilst engaging men in the same activities is difficult. Free from their job routines men tend to stay at home watching TV or spend their time seating in park benches.

Regarding the focus group discussion in São Brás, there are similitudes but also some additional points we can stress:

1. São Brás is a smaller territory with a higher level of administrative proximity and coherence. The municipality is determinant and the relationships between the municipality and the civic organisations are fluid and less complex. So, organisation problems seem not to exist, although some problems are difficult to tackle and everybody has this awareness. For example, the isolation and fragmentation of the rural areas.
2. The importance of keeping older adults active and the significance of learning was deeply discussed, as well as the differences between men and women – as we have indicated for Faro/ Olhão. The “university of the third age” is managed by local administration and looks very successful: more than 400 participants, a wide range of activities, and a huge interest in ICT (there are 8 groups learning ICT), are some of the indicators of such success. Yet most of the participants are women and there are differences in attendance according to some characteristics of the learning taking place. Again, more structured or traditional learning seems to be preferred by women; in swimming lessons we find almost none women from rural areas due to their perceptions of the body (even shame); and it is difficult to find men to dance. Additional elements reinforced this view. A particular association organises trips to watch football games all over the country and men domain here, as well as in cards competitions. All activities involving gaming are preferred by men, without a doubt.
3. As it happened in Faro and Olhão, there is the hope that the next generation will have a more positive attitude towards learning and physical activity as determinants of health and life quality. But even today, participants in the discussion seem already happy with the participation of older adults in the activities that exist in the area – exception made to rural areas. This seems to reinforce the ideas that information, organisation and diversity of the activities at the disposal of older adults are fundamental.

**PART 3: RECOMMENDATION**

**Recommendations for local administration and leaders of third sector organisations:**

A number of problems we have identified in our research calls for solutions and measures that go beyond the possibilities of local or regional action. It is our ethical duty to deliver recommendations to solve those problems. To solve those problems, only the central government and national policy would make a difference. Being so, our first set of recommendations is directed, in fact, to the central administration:

1. **Increasing the educational level and the qualifications of the Portuguese population**: this should be a priority, for multiple reasons. Speaking only of the scope of our research, the educational background constitutes a severe constrain which, over the life course, provokes a wide range of problems to the lives of the adults. The net result is at plain sight nowadays in Portugal: a generation which is impoverished, suffers from health problems, has no financial resources to live a dignifying life, and is completely dependent at all levels from others or from institutions.
2. **Policies to support older adults**: in the present scenario, these policies rely mostly in the sub-contracting of civil society/ care institutions, which struggle to give to frailer older adults the services they need to a dignifying life. These institutions lack the financial resources to face the today’s situation of an aged population, as well as human, technical specialised resources regarding, for example, the poor mental health of the population. To increase the level of institutionalisation of the population is no medium or long-term solution. This policy is biased in terms of social class and gender, affecting negatively older women and working-class men and women.
3. **A shift on the policies to support older adults**: public policies that target other dimensions of the social world of older adults would benefit the well-being of older citizens:
   1. Support to families so that older adults could stay with their families as long as possible;
   2. Supporting community housing provided by informal carers, or similar mechanisms that allow older adults to live in a familiar setting but benefiting from care;
   3. Certifying informal carers;
   4. Articulating with higher education institutions the promotion of training to both families and carers. Other measures could eventually be designed, to prevent an overload on the existing care institutions and electing community as a central collective actor on the lives of older adults.

Based on the findings we reported, more specific recommendations are directed to local administration and the leaders of civil society organisations:

1. Local administration should evaluate and improve the public spaces existing in municipalities. Creating free spaces where various activities can be organised is crucial to promote the involvement of the frailer adults (who lack financial resources, for example) in physical, educational or cultural activities.
2. There are different models of management of such public spaces. Just to give an example, the municipality of Aljezur (not included in this investigation) negotiated some spaces with the population. The municipality has transformed and equipped the spaces, but the population manages and use the spaces. Adequate models for managing public spaces should, therefore, be studied and implemented.
3. Public transportations are crucial to improve the mobility of older citizens. Public transportation should take into account the need of older adults. This is a responsibility of local administration. This is valid both for urban and rural areas.
4. Faro, Olhão and São Brás could all benefit from a strong investment on the removal of barriers to the mobility of people, taking into consideration those with reduced mobility. The access to administration and cultural buildings should be easy for all citizens.
5. Local administration can support directly or indirectly institutions that present a credible plan of activities targeting older adults in various dimensions: physical, educational, learning and cultural dimensions.
6. Local administration should include in the municipal educational plans the municipal strategy regarding the education and learning of older adults.
7. The support to the impoverished older adults requires integrated solutions that go beyond the importance of education and learning, to include the satisfaction of basic human needs. Local administration management bodies can have an important role on organising the local resources needed to tackle these situations, in extensive partnerships that should unite to face these problems.
8. Care institutions – residential homes, day-care centres, home-services, etc. – are increasingly experiencing financial and human resources problems to deal with the fourth age typical problems. These institutions are increasingly incapable to provide education and learning to older adults. At a regional and local level, it is possible to have a better planning made by wider partnerships that will assure education and learning opportunities to all older adults.
9. The evaluation of the education and learning opportunities available to older adults should be done in the context of the municipalities, taking into account the possibilities of all institutions, making a better use of the existing resources. New activities or new institutions should be created only after a global evaluation of resources/ educational offer, taking into consideration the needs of the older population.
10. Institutions of the various natures, worried about the well-being and quality of life of older adults, should build stronger and wider partnerships. A better organisation and information will benefit all older adults. These partnerships should include the security and health services.
11. Institutions of various natures that organise activities for older adults should make an effort to involve older adults in their management bodies.
12. Institutions of various natures that organise activities for older adults should be aware that the participation of women and men are driven by different factors (and understand those factors). Activities that are friendly to men and women should exist. The key is not in organising men-only activities, but the diversity of learning opportunities, so that men and women can choose the ones they like the most.