

Vilhena, Carla; Valadas, Sandra T.; Fragoso, António

## **Education matters: Cumulative advantages and disadvantages amongst Portuguese older men**

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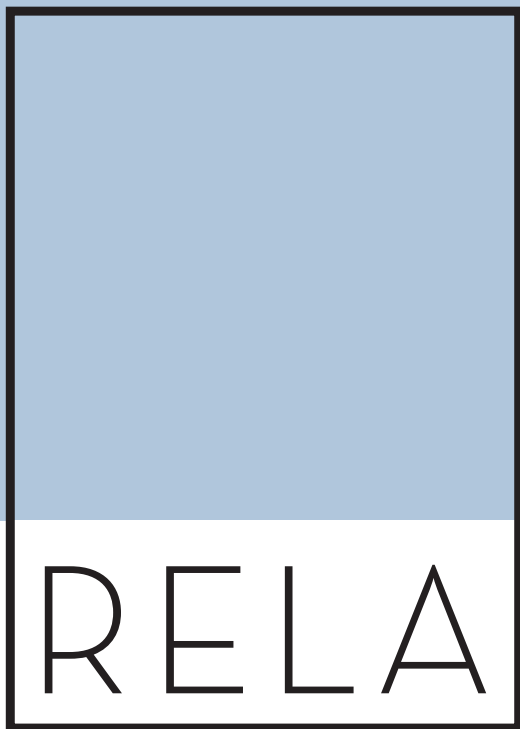
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## Education matters: cumulative advantages and disadvantages amongst Portuguese older men

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### Abstract

*Our paper sought to analyse the influence of the educational background over various dimensions of the lives of Portuguese older men (age 60+) across the life course. Drawing on the theory of cumulative advantages and disadvantages we used biographical research, namely narrative interviews with men from different educational background: men with a very low educational background and men with a medium/high educational background. Our results show the influence of educational background in the life course, and how it can contribute to accumulation of advantages/disadvantages that explain their biographies and the very different situations in which they live today.*

**Keywords:** Cumulative advantages/disadvantages; education; life course; transition

### Introduction

Increased life expectancy along with the decline in fertility rates have changed the demographic structure of western societies, which are now marked by a decreasing share of children and an increasing share of the older population. In Portugal, the ageing index



has raised from 98,8, in 2000, to 153,2 in 2017, being one of the highest of the EU (European Commission, 2018), and it is expected to increase in the next decades (European Commission, 2015). Projections of the elderly population established in 2015 predict that in 2060 34,6% of the Portuguese population will be aged 65 or more years, with almost half of the elderly (46,5%) aged 80 years or more (European Commission – Directorate-General for Economic and Financial Affairs, 2015). This scenario has led to an increasing concern with the significant challenges posed by population ageing. Older adults became a source of concern and are frequently depicted not only as a homogeneous group, but also as a problematic one (Chean, Sek, Moon, & Merrian, 2008; Mauritti, 2004; Stephens, Breheny, & Mansvelt, 2015).

In fact, processes of ageism that carry specific stereotypes (Phelan, 2011; Martinson & Berridge, 2015; Tarrant, 2013) partially maintain the homogeneous and negative images of ageing. The research community should contribute to tackle those images, namely highlighting the diversity among the older adults and stressing the impact of individual, structural and societal factors throughout the life course, and more specifically in the old age. Gender was a factor that caught our attention due to its influence in the participation in adult education and learning. Statistical data from the Eurostat demonstrate the influence of gender in participation in adult education, showing that in the EU28, in average, women participation is bigger than male participation. There are only four countries in which men participate in learning slightly more than women (Germany, Croatia, Switzerland and Turkey). It seems, therefore, that men are becoming minority participants in some spaces and sectors of learning (Golding, Mark, & Foley, 2014), despite how diverse might be the factors that explain this fact in a national level.

Previous research in Australia (Golding, 2011, 2012) indicated that fostering learning among older men, especially those with high levels of illiteracy, could make a difference in various dimensions of their lives, affecting positively their well-being. Moreover, informal learning taking place informally in the community generated in Australia a huge social movement (the men's shed movement). The Australian research inspired us to look at older men's learning from a European perspective. Exploratory research conducted in Slovenia (Jelenc Krašovec, Radovan, Močilnikar, & Šegula, 2014), Estonia (Tambaum & Kuusk, 2014), Malta (Galea & Farrugia-Bonello, 2014) and Portugal (Ricardo, Tavares, Coelho, Lopes, & Fragoso, 2014), revealed some promising results. In these countries, various non-structured activities developed in community spaces had an influence on older adult's well-being. It also became clear that women prefer structured, traditional learning activities, while men tend to engage in hands-on activities, problem-oriented in some cases, and those characterised by competition. This community-based learning contrasted deeply from formal and vocational learning and 'the informal learning style preferred by men is also deeply embedded in their own past and present experience, independent of the source of such experiential knowledge (stemming from work and working life, or roughly coming from leisure)' (Fragoso & Formosa, 2014, p. 103).

Those exploratory studies were the base of the Old Guys project<sup>1</sup> that focus on the learning of men with 60 years or more. As a part of this study, we interviewed in southern Portugal around 90 men between 60-93 years old in various situations (more details in the methods section) and in urban and rural environments. The emergent analysis of this data proved to be a very complex problem, as it was very hard to uncover patterns that had a meaning. However, when we used the simple criteria of academic background (complemented with urban/ rural environment), patterns begin to appear across the life course of the men from our sample. We were able to define three different groups of men and analyse the patterns coming within these groups. At this point, the aims of our article

emerged: to analyse the influence of the educational background over various dimensions of the lives of men over 60 across the life course; and to understand the evolution of men's life context, bearing in mind the constant tensions between structure and agency, trying to reach a complex explanation of their present situation.

### Theory of Cumulative Advantages and Disadvantages

Older adults are far from being a homogeneous group. Their life courses are shaped by health, financial capital or educational attainment, among other variables, differences which led to inequalities across the life course (Dannefer, 2003; Halpern-Manners, Warren, Raymo, & Nicholson, 2015; Mazzonna, 2014). If it is true that globally socioeconomic inequality is increasing (Piketty, 2014), Portugal has, among the European countries, one of the highest levels of income inequality (OECD, 2018) and some of the poorest regions of EU (European Commission, 2018). This is the result, according to Petmesidou and Papatheodorou (2006), of 'the weak distributional impact of social transfers, which in turn reflects the weakness and imbalance of their respective social security systems' (p. 15).

The susceptibility of older people to inequality has been gaining attention (e.g. Dannefer & Huang, 2017; Grundy & Sloggett, 2003; Heap & Fors, 2015; Heap, Fors, & Lennartsson, 2017; Milbourne & Doheny, 2012; Ponomarenko, 2016; Wildman, Moffatt, & Pearce, 2018). The existing evidence suggests that old age is a period of life of significant socioeconomic inequalities. More, these inequalities are increasing (Crystal, Shea, & Reyes, 2017; Scherger, Nazroo, & Highs, 2011): 'At ages 65+, the least well-off 40% shared only 14% of total adjusted income by 2010, suggesting that the 'two worlds of ageing' phenomenon (Crystal, 1982) persists, with even greater disparities between prosperous and penurious elderly' (Crystal et al., 2017, p. 915). Those disparities are visible in several domains of life like, for instance, health status and wealth, and can be better understood from a life course perspective.

One of the main causes of income disparities in Portugal is educational attainment. As Papatheodorou and Petmedisou (2006) have shown in their analysis of poverty profiles in the European southern countries, Portugal is characterized by the existence of a strong relationship between educational level and income:

Portugal has the sharpest differences in average income and poverty rates between educational groups. The average income of households in which the head has a third-level of education is three times higher than that of households in which the level of education of the head is less than the second stage of secondary education. The poverty rates in these two subgroups are 1.4% and 24.6% respectively (ibid., p. 76).

Portugal has been characterized by low literacy rates and school enrolment. At the beginning of the 20<sup>th</sup> century 75% of the population (aged 7+) was illiterate, in 1940 it dropped to 50% and in 1970 to 25%, one of the highest illiteracy rates of the European countries (Candeias, 2010). Compulsory schooling was reduced from 5 to 3 years, in 1930, during the dictatorial regime, and only extended to 4 years, in 1954 for the boys and in 1960 for girls. Secondary and higher education was intended for a minority of the Portuguese population, mainly for the rural and urban elites. Moreover, it was only after the implementation of the democratic regime, in 1974, that social programmes, like the development of a national health care system or public systems of social protection began to be developed (Valadas, 2017). Until then, and under the dictatorial regime, the dominant ideology was the *familialism*, 'supported by the rural condition of a large part



of the population which permitted the maintenance of social support based on family and community solidarity' (Portugal, 1999, p. 236) and also low expectations of social mobility.

So, it is not surprising that the majority of Portuguese older people (65+) has no more than four years of schooling (73,7%) and only 12,3% has secondary, post-secondary or tertiary education and, consequently, due to the relationship between education level and income, poverty and inequality in old age are a reality.

The theory of cumulative advantages/disadvantages has been used to explain inequalities in old age (e.g. Crystal et al., 2017; Heap & Fors, 2015; Ponomarenko, 2016; Read, Grundy, & Foverskov, 2016) and suggests that these are a result of exposure to social and personal advantages/disadvantages in different domains throughout the life course, resulting from a long-term social process. Crystal, Shea, and Reyes (2017) state that

increases in inequality observed among members of each cohort as it has aged, and persistently high inequality in late life, speak to the continuing pattern by which early advantages and disadvantages have effects that persist, and indeed are magnified, over the life course (ibid., p. 917).

In fact, inequality can be amplified, maintained or attenuated by structural factors (e.g. pension schemes, social benefits, access to healthcare) or by personal choices. We should also note that throughout the life course disadvantages can be reinforced through *timing*, that is, through disadvantage at a crucial moment in life (e.g. health problems that lead to early retirement) or through long term exposition to social disadvantage, that is, *duration* (Ponomarenko, 2016).

One issue that emerges in the studies about cumulative advantages/disadvantages is, therefore, the dialectics of social structure and human agency. Although the role played by agency in how people respond to life events and construct their life experiences is recognized, studies of processes of accumulation of advantages/disadvantages during the life course have shown that individuals 'have agency *to a certain extent* and this agency is limited *to a certain extent*' (Duncan, 2015, p. 42). According to Dannefer and Huang (2017) agency, defined as 'the human constant of formulating intentions and externalizing them into human activity' (p. 6), is not only constrained, but also shaped by social structure like, for instance, access to education and learning in young age or in adulthood.

Even though processes of accumulation of disadvantage can be modifiable by human agency, this is far from being an easy process, especially in old age (Heap & Fors, 2015; Walsh, Scharf, & Keating, 2017). Older adults have fewer opportunities to improve their financial situation, in case of material deprivation, or to overcome physical and mental health problems. In addition, the accumulation of disadvantages could be amplified by old age vulnerabilities (Walsh et al., 2017). Several studies have revealed that older adults are more vulnerable than younger adults to disadvantage in several life domains, like material privation or health problems (Heap & Fors, 2015; Heap et al., 2017; Walsh et al., 2017).

Research studies carried out on health inequalities later in life have shown that there is a relationship between socioeconomic status and health (e.g. Grundy & Sloggett, 2003; Hoebel, Rommel, Schröder, Fuchs, Nowossodeck, & Lampert, 2017; Matthews, Jagger, & Hancock, 2006; Mirowsky & Ross, 2005; Read et al., 2016; Zimmer, Hanson, & Smith, 2016), with those in the most socio-economically disadvantaged group suffering the greatest health disadvantage (Grundy & Sloggett, 2003). This well-established relationship suggests, as Dannefer (2003) claims, the need to consider cumulative advantages/disadvantages process in the study of health and ageing. Research has

indicated that economic poverty during the life course increases the probabilities of health problems in old age (Grundy & Sloggett, 2003; Kahn & Pearlin, 2006), like, for instance, frailty (Poli et al., 2017); the perception of greater barriers in access to health care services (Hoebel et al., 2017); and subjective health and well-being of older people (Read et al., 2016). Furthermore, wealthier individuals not only have a lower risk of suffering from health problems (Mirowsky & Ross, 2005), due to the adoption of healthier lifestyles and facilitate access to appropriate health care during their life course, but also have financial resources that may function as a partial buffer to some of those issues (e.g. home adaptation in cases of reduced mobility; home care).

Research on cumulative advantages/disadvantages processes has also found considerable evidence that financial capital in later life is determined by the previous employment history and, therefore, influenced by educational level and occupational status (Milbourne & Doheny, 2012; Möhring, 2015; Myles, 2002; Scherger et al., 2011). The existing evidence suggests that the amount of pensions benefit depends on the individual employment history (e.g. regular or atypical employment; frequency of employment interruptions), and the chance to save for retirement or to enroll in a private pension saving depends on the level of income during working life (Milbourne & Doheny, 2012). However, this relationship between individual employment history and financial capital in old age can be attenuated or amplified by specific pension schemes (Möhring, 2015). We can therefore state that earlier inequalities in educational attainment and in labour market position can lead to economic inequalities in old age; those inequalities may, nonetheless, be altered by structural factors. More specifically, it can be attenuated if an enough pension income is guaranteed or, on the contrary, amplified if the pension income is related to the amount and number of contribution years.

In countries, like Portugal, characterized by an employment-linked social insurance, and in which the family has an important role in managing risk and social responsibilities, having a stable, lifelong employment functions as a protection against social exclusion and inequality, namely in the old age. Therefore, those with an employment history characterized by periods of unemployment or non-qualified jobs face a higher risk of disadvantage in old age (Esping-Andersen, 2002).

Disadvantages in one life domain create a vulnerability to disadvantage in other life domains (Heap & Fors, 2015; Walsh et al., 2017). Accordingly, financial capital may limit the scope of leisure activities in which old people can engage (Scherger et al., 2011); the involvement in political activities (Milbourne & Doheny, 2012) and civic participation; influence the social network dimension (Cabral, Ferreira, Silva, Jerónimo, & Marques, 2013), and the quality of life (Blane, Netuveli & Bartley, 2007). Halpern-Manners, Warren, Raymon and Nicholson (2015) also claim that well-being in later life is influenced by previous work and family experiences.

All those studies have in common, besides stressing the persistence of social inequality through individual's life courses, the highlight of the crucial role that education plays in the cumulative advantages/disadvantages process throughout the life course. Education influences, for example, the choice of occupation (Van Kippersluis, O'Donnell, Van Doorslaer, & Van Ourti, 2010), life expectancy (Rogers, Hummer, & Everett, 2013), financial planning (Tamborini & Kim, 2017) or cultural participation (Scherger et al., 2011). Educational attainment not only plays an important role in health and income inequalities, but also in attenuating or aggravating income and health effects on individuals' life trajectories. Mirowsky and Ross (2005) state that 'education transforms the person, putting the individual's life in a different track. Education acts as structural element of the individual's life' (p. 28). In other words, educational attainment sets the course of one's live and, consequently, of well-being and life quality in old age.

Given the central role played by educational attainment in setting individuals life course and, consequently, in the process of cumulative advantages/disadvantages, the main aim of the current research was to provide a better understanding of the life course of Portuguese older men (+60) with different educational backgrounds, focusing in a number of life dimensions like, for instance, professional trajectories, social network or involvement in learning and leisure activities. Since *timing*, that is the occurrence of disadvantage in crucial moments of life, can reinforce life course disadvantages (Ponomarenko, 2016), as mentioned earlier, we were especially attentive to transitions triggered by events such as divorces, deaths of companions, health accidents. Our intention was to understand how the participants coped with these transitions and the impact they had, from the individual's point of view, in their present situation.

## Method

When theorising the experiences of men's ageing it is important to consider the power. Because cumulative advantages and disadvantages can only be understood in a life course perspective, we used biographical research in our investigation. According to Schafer, Ferraro and Mustillo (2011), disadvantages through the life course are 'rooted in concrete social conditions and meaningfully incorporated in human narrative' (p. 1082), that is through *biographical structuration*. Biographical research seeks to understand the changing experiences and viewpoints of individuals in their daily lives, what they see as important, and how to provide interpretations of the accounts they give of their past, present and future (Roberts, 2002). They also 'offer rich insights into the dynamic interplay of individuals and history, inner and outer words, self and other' (Merrill & West, 2009, p. 1), so this strategy seemed the most appropriate and useful approach. Moreover, we believe that individual stories have meaning within a certain historical and social context (Merrill, 2015). Although biographies always begin with the individual story, they go beyond this and bring forward the collective, allowing us to understand how groups are affected by structural conditions such as class, gender and race. We are thus talking about the interplay between structure and agency, history and the present (Plummer, 2001).

We interviewed 90 men aged between 60 and 93 years old, living in rural and urban areas of the Algarve (Faro and Olhão are urban areas; São Brás is a rural area). We tried to have the maximum diversity regarding the following criteria: situation before work (retired, active, unemployed), educational background, income, geographical distribution, and level of activity in civil society organizations. We did *not* interview institutionalized men (in residential homes, for example), since we choose to include in our sample only men who can lead an independent life. For the same reason, men who attended day-care centres or similar, but were independent, were considered in the study.

To collect data, we used narrative interviews, so that it was possible to capture different dimensions of the participant's life course, generate rich descriptions of people's lives (Merrill, 2015) and highlight transitions and change in the life course (Biesta, Field, Hodgkinson, Macleod, & Goodson, 2011; Hallqvist, Ellstrom, & Hydén, 2012). Riemann (2003) argues that narrative interviews involve: (1) a relationship of trust between interviewee and interviewer before and during the interview; (2) a generative question which elicits a narrative of the interviewee's involvement in a constellation of experiences and events that are relevant to the interviewee; (3) a series of questions and answers, that are based on the narrative and questions. The narrative interview included information

concerning childhood (family background, schooling), working life, transition to retirement and actual life (health status, financial situation, family and social networks).

Through content analysis, we examined data in order to understand what they mean to people (Krippendorff, 2013). We did not use pre-established categories. Instead, we used an inductive procedure to try to uncover emergent patterns of meaning (Kondracki, Wellman, & Amundson, 2002) that could guide us to build our categories. Our first attempts were unsuccessful due to the huge diversity of the information – which was indeed a reflection of the diversity of older adults. We then tried to separate men in three different groups using as criteria the educational level and rural or urban context of life. Group 1 included men from urban areas with a very low level of educational background (four years of schooling or less); group 2 included men from rural areas with a low/medium educational background (most with nine years of schooling, but some with secondary level); group 3 included men from urban areas with a medium/high educational background (some with nine to 12 years of schooling, some with a tertiary educational degree). In respect to group 3, we must say that due to the low levels of schooling, particularly, as mentioned earlier, in old adults (+65), men with nine years of schooling, like those in our sample, had an easy access to qualified jobs (e.g. bank manager, specialized techniques professions) and, therefore, to a financial and cultural capital similar to the older men who had a tertiary educational degree. For that reason, it seemed logic to group them together.

This grouping produced very interesting results: not only we discovered similar patterns within each one of the groups, but also patterns were different between groups. In this article, and considering our aims and theoretical framework, we present the results from groups 1 and 3.

### *Men with a very low educational background*

This group includes men with four years or less of schooling and some of them are illiterates. As expected, given the relationship between educational attainment and professional trajectories, they have a working history as non-qualified or manual workers: working in civil construction, waiters in restaurants or coffee shops, fishermen, dockers, shoemakers, etc. Although we find some men who had a more or less continuous occupation, most of them had a history of changing from a non-qualified job to the next one, therefore with high levels of professional instability. A significant number of these men had worked in the informal economy at least for parts of their lives and this has consequences on decreasing even further their pensions, calculated in the basis of the numbers of years and amount of contributions to the tax system.

Having a low income is also something common to these men. The goods they possess can be seen as an indicator of their level of financial capital: it is very rare that we find someone in this group possessing a driver's license and none has a car – bicycles are more common though. Only a few have TV. None has used computers or other digital devices apart from the mobile phone. Still, not all possess a mobile phone and the ones who do make a basic use of it. Some of them are still working because they need it to survive: for example, Manuel earns a pension of 180€, in a country where the minimum wage is about 580€ and renting a very small flat in a peripheral area will cost at least 300€/month. We found some men in this group who did not had a place to stay, or were dependent on friends who lend them small precarious 'rooms' in the back of some courtyard. Most of these men, therefore, live in very precarious conditions or even in poverty. Some of them do not have enough not even to eat: they are dependent from the assistance of 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 a forced earlier retirement, or cause a deficiency. The former and the later further deepens their poverty. In addition, these health problems can also reduce dramatically their mobility and constraint their ability to socialise. The fact that in most public spaces there are still important obstacles to mobility does not help. Just to give an extreme example, we interviewed a man who did not leave his own small apartment for about two years because he was in a wheel chair and could not get-out without the help of someone.

These men's transitions to retirement (when happened) were generally problematic, due to multiple causes. First, basic financial problems due to a professional life of low salaries with no possibilities to accumulate even a small amount of money or the loss of income after retirement. Furthermore, only a minority of these men have financial support from their families. Their reduced financial capacity, as seems natural, has a negative effect in a number of life dimensions. To give an extreme example, it is frequent that these men meet in neighbourhood coffee shops or in the marketplace. But some have so deep financial problems that even cannot afford to buy a coffee (around 70 cents in Portugal) and give up socialising due to social shame (hence the importance of public spaces, like parks). Second, among these men social networks tend to be small in dimension and very unsatisfying. Some are alone, some have some family, and some others have family but do not meet family members regularly. João, for example, does not even know where his two nephews live and the only contact with his sister happens when she takes him to the medical centre – when he really needs transportation. Contacts with neighbours tend to be 'civilised' but not deep and friends are in the decrease. Loneliness is a problem:

I go to the doctor or go to Faro in an ambulance, but I go and come back alone, it's a sadness... not too long ago I asked to a grandson of mine 'come with me to visit your grandmother at the home' and he told me 'I don't have time'. Well, if he doesn't have the time he doesn't, it is a sadness (...). I watch TV and seat by the front porch for some hours waiting for the time to go by, I see it go by.

Third, a considerable number of men are widowers. For a small number of men, the death of their wives was a traumatic event that left psychological marks (depression or even suicidal thoughts). Fourth, the majority of these men have mobility problems: in some cases, this only means that they are confined to the area of their neighbourhoods; others have health problems that really constraint their mobility with negative effects in their socialisation. The conjunction of all these factors leads to a terrible situation after retirement, marked by poverty. In these conditions, it is not strange that, generally speaking, these men's expectations towards life itself are very low. In the words of António and Ricardo:

There is only motivation when there's a job so that we feel good; one needs a goal in life. I still have some objectives, but the rest is lacking, work is lacking, a house to live is lacking (...) Tell me, what strengths you think people like me have left to live, the way things are today?

Now I feel I'm like a dog and sometimes I say this because I'm wishing to die so I don't suffer anymore. Why don't I die? I would lay down now and not awake anymore, because I'm alone.

Nevertheless, not all the men we interviewed have travelled difficult transitions to retirement and not all men live a terrible situation. A minority of men seem to have successful subjective transitions to retirement. Some keep a professional activity (even if this shows a simple financial need) and this is central in their lives. This is very common among fishermen, for example. After a life of work in boats of all kinds, they are still paid for doing some activities in the docks (taking care of fishing nets, for example). Even if their lives are not particularly comfortable by our standards, they do not complain. Also, they use public spaces for socialisation purposes and play some games with their friends (cards, dominos, etc.). In some cases, we can see that support coming from social networks does make a difference, not only in the way these men subjectively perceive retirement, but also in their objective situation (friends, family, and ex-employers made a difference in some cases).

The patterns of activity of the men in this group include little intellectual activity and no participation at all in structured learning; no physical activity except if their occupations require it. Socialising, usually in neighbourhood coffee shops, or public spaces in the community, is the more noticeable activity they keep. They also have a very low level of participation in associations of some kind, even if some had such experiences in the past. It is natural that even when asked for, most men are not able to identify activities they would like to participate in. A minority claim that the community lacks public spaces where activities of some kind would take place.

### *Men with a medium/high educational background*

This group includes older men that spent a minimum of nine to twelve years in school and some of them have a higher education degree. It is important to note that, as explained earlier, nine years of schooling, in Portugal, 40-50 years ago, when these men began their working life, was not a low educational level; quite the contrary, this was more than enough to give an easy access to employment (not so affected, then, by credentialism). It is therefore natural that the men of this group have a wide range of professions, most of them marked by high salaries and even high social status (engineers, teachers, bankers, specialised technical professions, executives, higher education lecturers, etc.). Their professional trajectories are marked by significant financial capital and a higher social, cultural and symbolic capital. These types of capital were crucial during the professional trajectories of these men, as facilitators of employment, changing or progressing in the career, and to easy the access to political functions in local administration.

Most of the men in this group possess a car and drive frequently (the ones who do not, simply have attained an age in which driving is not safe and do not have a driver's license anymore). The great majority has computers and use social networks, email and internet (in some cases, daily). All of them have mobile phones and use a considerable number of applications. We can summarise by saying they have a comfortable life, in respect to financial issues and have no serious problems with mobility.

The men of this group generally navigated successful transitions to retirement. This does not mean there were no obstacles at all during the transition. Most of these men had a very active life in professional terms and preparation to transition was mostly absent and for that reason some of them talked about difficulties in coping with the process, but also of a set of factors that helped them to navigate the transitions and achieve a better situation, overcoming, therefore, the initial difficulties. First, a considerable financial capital is of outmost importance and has a positive effect in various dimensions of life (access to several goods and services, a more comfortable life in material terms, a buffer against unpredictable events, ability to travel to other countries, etc.). Second, social

networks tend to be bigger and more satisfying, with increased opportunities both to give and to receive social support. To all of them family is fundamental and they gather frequently with sisters and brothers, daughters and sons; some of them provide financial help to other members of the family (mainly their children). and the majority has an active role in socialising or helping in the education of grandsons and granddaughters. Globally they maintain friends from their professional *milieus* and arrange frequent meeting with them either daily in coffee shops, or a weekly lunch, for example. The majority of these men are very active in local associations, sport clubs, amateur's theatre groups, cultural associations, or similar, some of them as leaders. Those are, in most of the cases, long-lasting activities that were once fundamental to the cultural life of the cities of Faro and Olhão; and a source of rich and deep socialisation that men use as an important resource after retirement. These men are active members in the community; they contribute daily to the community life in various roles. Third, men in this group have enough financial capital to be able to react adequately if a serious health problem occurs, attenuating their negative impact, and to provide help to their families in similar situations. Fourth, they maintain, after retirement, a very interesting pattern of activities, in diverse dimensions: they are physically active, walking was the most popular form of activity. They also have a wide range of cultural interests: reading, cinema, theatre (some belong to theatre groups), singing, learning in universities of the third age, or cultural performances of different natures. A significant part has hobbies of some kind. Some are volunteers (for example, two teach in third age universities). In addition, the majority not only had the habit of travelling but also keep that habit after retirement. To summarise, most men were able to maintain their activities after retirement and a significant number were able to pursue new interests.

When asked about the most common problems that affect older adults, the men answer as if they were not talking about themselves, but about the others, which is meaningful. Most of them pointed common problems, such as loneliness, apathy, mobility and physical obstacles to mobility, etc. Interestingly, men think that there is a wide range of available educational, physical and cultural activities that older adults could benefit from. The problem is not, thus, the lack of offers, but instead the lack of interest in participating in these activities. They also point that the contact with younger people is crucial and defend enthusiastically inter-generational learning.

## Discussion

The past and, partially, the present situation of the men belonging to group 1 can be better understood if we situate them within history. As mentioned above, these men grew up in the context of a dictatorial regime, in a time when we had 3/4 years of compulsory schooling and social protection measures in areas like health care or unemployment protection were almost inexistent. They lived their childhood, and some of them, part of their adult life, in a rural and unindustrialized country, in which only the elites and, since the 1950s, a growing urban middle class, had access to secondary and higher education. The men we interviewed lived most of their productive lives as the typical working class within the dictatorship regime and represent, maybe, a very specific generational group. While the ones who were able to educate themselves higher than the average escaped a poverty-type life – even if belonging to the working class – the ones that spent four years or less in school had a complete different fate. It seems that there is, in Portugal, an impoverished generation which has consequences in the quality of life in old age. Elements from other studies seem to support this idea. For example, a recent

investigation, focusing the active ageing of the Portuguese population (Cabral et al, 2013), concluded that only a minority of the population aged 65+ adopted practices associated with an active ageing (30%). However, more than 50% of the population aged 50-64 adopted practices associated with active ageing and these were five times higher than the ones of the population aged 75+. Again, there seems to be a big difference between the generation of those who are now older, and the generation next to them.

Echoing the results of previous research (e.g. Grundy & Sloggett, 2003; Mirowsky & Ross, 2005; Schreger, Nazroo & Higgs, 2011; Wildman et al., 2018) our study shows that, in both cases, educational background seems central to quality of life in adulthood and, more specifically, at old age. Men with very low levels of schooling had only access to occupations that granted them only the enough to survive. Although some of them changed jobs repeatedly, they were never able to escape the low salaries typical of non-qualified professions. We also have to stress that the great majority of labour rights was only possible in Portugal after the revolution of 1974. Basic things as the minimum wage, unemployment subsidies or the national health system were only possible after the dictatorship regime under which these men lived has ended. The very low pensions most of them have today mirror that historical reality. There are, in short, little common points between life as we see it today, and the more of 40 years of productive and social life that marked the life course of these men. Social protection came too late for this generation and clearly was not sufficient to prevent them to fall into a deep poverty. Throughout the life course, the participants literally accumulated a set of disadvantages that begun with a low education and were accentuated by the inexistence of a welfare system: low financial capital, limited labour rights, limited social protection, deficient health care, no access to culture consumption.

To some of these men, a number of biographical events functioned as transitions, in this case as transitions marked by a *worst* life quality: health accidents, traumatic divorces, family changes that reduced their social support, or the death of their spouses. Their transition to retirement was in most cases the last one of these hard transitions, understandably complicated and precipitating a new step into poverty and loneliness. This means that inequalities were amplified through disadvantages at a crucial moment in life (for example, the events that triggered non-predictable transitions), that is through *timing*, or through long-term exposition to social disadvantage, that is to say through *duration* (Ponomarenko, 2016). We can say, in summary, that the men today's situation is a product of this set of accumulated disadvantages throughout the life course. Consistent with the existing research on cumulative advantages and disadvantages in old age (e.g. Crystal et al., 2017; Dannefer & Huang, 2017; Pomarenko, 2016; Schafer et al., 2011), our study shows that for the great majority of old men, social structure was much stronger than individual agency.

Nevertheless, we have to point-out that some of the men with poor educational background were able to be agentic in the sense of overcoming the constraints of structural conditions. As pointed by Duncan (2015) individuals have agency to a certain extent. In our results, we stated that some men use socialisation, gaming, and social support from their networks to experience a situation they do not complain off, even if by our standards their life quality is relatively low. Agency can depend on small details and be an individual subjective experience.

The experiences of the majority of men with a medium/high educational background literally reverse our discourse. It shows how education can be a crucial departure point to open-up the horizons of people. The majority of men biographies when analysed throughout the life course show the cumulative effects of advantages. In their cases, education was a key-factor to access a much better profession and higher financial capital.



Some of these occupations carry extended social networks and an increased social capital, fundamental for widening their choices, progress in the career, entering the world of local and regional politics, etc. Financial capital was fundamental in their ability to access, enjoy and produce culture, to travel to different countries and maintain much more satisfying social networks of friends – which by its turn brings also more possibilities to receive and give social support.

It is important to note that also in this group we are able to identify the tensions between agency and structure, especially during transitions. Many of these men had lived traumatic events that triggered difficult transitions, similarly to men from the first group. Some were devastated by the death of their spouses; others lived severe illnesses of sons, daughters or companions; others had problems during the transition to retirement, namely to adapt to a less intense life, while still others migrated and experience troubles adjusting. Their problems, traumatic events, and challenges posed by various transitions were real. However, these men were capable to overcome these challenges with much more success. Analysing our results, we are claiming that the ability to make successful transitions has two major determinants: the first is the amount of resources these men can mobilise to navigate these periods of transition and the diverse nature of such resources – the diverse capitals, the extended social networks, etc. We should stress that the educational background is, of course, fundamental for the men to have opportunities to build these capitals. Second, there are individual learning processes within transitions (cf. Alheit, 1995). This biographical learning is, apparently, much more common and effective among the more educated men.

## Conclusion

According to the theory of cumulative advantages/disadvantages inequality in old age results from a social process than begins in very early ages and continues throughout the life course (Crystal et al., 2017; Heap & Fors, 2015). We should also note that the analysis of the process of accumulation of advantages/disadvantages, in a life course perspective, demonstrated the persistence of social inequality, highlighting the central role played by education in that process (Rogers et al., 2013; Scherger et al., 2011; Tamborini & Kim, 2017; Van Kippersluis et al., 2010).

In our study, we examined the life course of Portuguese older men (+60) with different levels of schooling: Group 1 – Men with a very low educational background, and Group 2 – Men with a medium/high educational background. As our results revealed, to these men, the access to education, in childhood, marked their life course. Men with low levels of schooling had a more difficult life, characterized by financial hardship or even, in some cases, poverty, than those with higher levels of schooling that had better jobs and a comfortable life. We should also note that the fact that most of these men lived their lives under a dictatorial regime, adverse to the development of a welfare state, in which social support was based on family and community solidarity, has affected negatively those with low levels of educational, social or financial capital.

To conclude, we think that cumulative advantages and disadvantages gives an important contribute to the explanation of the current situation of the men who participated in the study. It is a fact that we have not used all our results, but only the ones from the extreme groups. The extreme situations are, in this case, helpful to understand how advantages and disadvantages correspond to processes that exist in a significant period. Their accumulation can produce very different results and has a visible effect in

the quality of life of people, despite the permanent and complex dynamics between structure and agency.

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