

# Theory of Social Representations and the Meanings of Retirement in Brazil

*Teoria das Representações Sociais e os Sentidos da Aposentadoria no Brasil*

*Teoría de las Representaciones Sociales y los significados de la jubilación en Brasil*

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## ABSTRACT

**Objective:** to reflect on the contributions of the Theory of Social Representations to understanding the meanings of retirement in Brazil. **Content:** this theoretical-reflective study, based on a critical reading of scientific articles available online in databases and both classic studies of social representations theory and studies of the phenomenon of retirement, is divided into two sections: i) Theory of Social Representations and ii) The meanings of retirement in Brazil. **Final remarks:** research using the social representations theory was found to help understand how retirement is understood by different social groups and, thus, provide input to guide these groups better, both during retirement planning and in deciding whether or not to retire.

**Descriptors:** Nursing; Work; Retirement; Aging.

## RESUMO

**Objetivo:** refletir acerca das contribuições da Teoria das Representações Sociais para a compreensão dos sentidos da aposentadoria no Brasil. **Conteúdo:** trata-se de um estudo teórico-reflexivo elaborado com base em leitura crítica de artigos científicos, disponíveis on-line em diversas bases de dados e obras clássicas sobre a teoria das representações sociais bem como aquelas relativas ao fenômeno da aposentadoria. Estrutura-se em duas seções: i) Teoria das Representações Sociais e ii) Os sentidos da Aposentadoria no Brasil. **Considerações finais:** verifica-se que pesquisas utilizando a teoria das representações sociais possibilitam conhecer o modo como a aposentadoria é compreendida por diferentes grupos sociais e, assim, fornecer subsídios para melhor orientar estes grupos tanto durante o planejamento da aposentadoria quanto na decisão de aposentar-se ou não.

**Descritores:** Enfermagem; Trabalho; Aposentadoria; Envelhecimento.

## RESUMEN

**Objetivo:** reflexionar sobre los aportes de la Teoría de las Representaciones Sociales para la comprensión de los significados de la Jubilación en Brasil. **Contenido:** se trata de un estudio teórico-reflexivo basado en la lectura crítica de artículos científicos, disponibles en línea en varias bases de datos y obras clásicas sobre la teoría de las representaciones sociales, así como las relacionadas con el fenómeno de la jubilación. Se divide en dos apartados: i) Teoría de las Representaciones Sociales y ii) Los significados de la jubilación en Brasil. **Consideraciones finales:** se constata que investigaciones que utilizan la teoría de las representaciones sociales pueden ayudar a conocer la forma cómo los diferentes grupos sociales entienden la jubilación y, por lo tanto, proporcionar subsidios para orientar mejor a estos grupos, tanto durante la planificación de la jubilación, como en la decisión de jubilarse o no.

**Descriptores:** Enfermería; Trabajo; Jubilación; Envejecimiento.

## INTRODUCTION

As complex as thinking about the work process and its ways to produce pleasure or distress, and health or disease, it is to reflect of the retirement process. In the Portuguese language, this term refers “to the notion of sheltering in rooms” or “ceasing activities”. Thus, the retirement process can be understood as part of the reality of professional life and marks the person's exit from the labor market, being an event that, countless times, is associated with the last life cycle: old age<sup>1</sup>.

A number of research studies dealing with retirement adopt different approaches and methodologies and admit that there is no single, unanimous meaning attributed to this phenomenon<sup>2,3</sup>. However, in the face of the capitalist logic, both the situation of non-work and old age can appear in the social imaginary with a negative connotation. For example, retirement can be understood as a period of transition and changes closely associated with the loss of work and identity in relation to the social role<sup>3</sup>.

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Social imagery is one of the elements of the social representations, whose objective is to guide the social behaviors and practices. In turn, social representations are constituted by shared beliefs, knowledge and opinions, which enable us to interpret reality through symbolic and significant elements, integrating them into everyday life<sup>4</sup>.

Thus, it is believed that, by understanding how the phenomenon of retirement is presented in the social imaginary and has been socially represented in several groups, the understanding of the factors that motivate the decisions made by the workers is also broadened, such as: willingness to abandon the labor market early, immediately or late in time and even returning to work activities even after retirement.

It is in this context that the Theory of Social Representations (TSR) developed within the scope of Social Psychology is highlighted, as it provides subsidies for understanding different social realities and brings to light aspects hitherto unknown of these realities. After all, social representations are socially elaborated and shared knowledge that work as a system to interpret reality that governs the individuals' relationships with their physical and social environment and determines their behaviors or practices<sup>5</sup>.

Therefore, the TSR offer a theoretical-methodological instrument of great use for the study of the conformation of the social imaginary on the thought and behaviors of people and groups, such as active and inactive workers, recently retired or those who are about to retire.

In light of the above, considering that different meanings and perspectives affect retirement, the study involves complex issues related to work and aging, and aims at reflecting on the contributions of the TSR to the understanding of the meanings of retirement in Brazil, based on the results of previous research studies.

## CONTENT

This is a theoretical-reflective study based on classic works on the Theory of Social Representations<sup>5-9</sup>, as well as on the critical reading of scientific articles available online, and focusing on the TSR and the phenomenon of retirement<sup>1-4,10-22</sup>. The material analyzed was obtained from a narrative literature review. This type of study has a similarity with qualitative research studies, based on the description and analysis of theoretical constructs apprehended through a bibliographical survey<sup>23</sup>.

The results were organized and discussed by means of two theoretical sections: i) Theory of Social Representations; and ii) Meanings of Retirement in Brazil. These sections were built based on the survey and analysis of the bibliography investigated, as well as on the observance of contents that could be elucidative to the problem and to achieve the objective.

It should also be noted that the article was elaborated considering the four pillars of the Theory of Social Representations, namely: consensual universe, reified universe, anchoring and objectification<sup>6,10-11</sup>.

### Theory of Social Representations

The Theory of Social Representations (TSR) was proposed by Moscovici in 1961, in France. The Social Representations (SRs) are almost tangible entities. They relentlessly circulate, intersect each other and crystallize through a statement, gesture or encounter, in the everyday universe. They correspond to acts of thought in which the subjects relate to the object and, through several mechanisms, this object is replaced by symbols, causing it to be represented in the subjects' minds<sup>6</sup>.

Social Representation is a philosophical term that means the reproduction of a perception retained in the memory or the content of thought, which always retain the mark of the social reality where they are born, but also have an independent life, reproduce and mix, having as causes other representations and not only the social structure. In the social sciences, they represent the thought categories that express reality, explain it, justify it or question it<sup>24</sup>.

When applying this theory, individual responses should be considered as a reflection of manifestations of a social group, with which the subject shares experiences. After all, this is one of the implications of the TSR to develop the subject's understanding in the midst of a defined socio-historical-cultural inscription and a personal history. It takes into consideration that subjects belonging to the same social group have common social experiences and are similar to each other for sharing an incorporated *habitus*, a language standard and rationalization<sup>7</sup>.

Despite being substantially social, Moscovici's work does not lose sight of the individual and the person is not taken as an isolated subject, but rather considered in their singular responses as manifestations of tendencies of the group to which they belong<sup>8</sup>. Thus, it should be considered that, as proposed by Moscovici, in the TSR there are two forms of knowledge: consensual, which is presented in everyday life, through which the SRs that derive from common sense are accessed to; and scientific, which has its own language and internal hierarchy. Each of these forms is capable of generating its own universe and a relationship of hierarchy is not established between them, one knowledge does not overlap the other, having different purposes<sup>11</sup>.

This study deals with the retirement phenomenon. In the light of the TSR, the phenomenon is what moves the gears of thought and oscillates, in the face of something that affects society and that can be captured through conversation circles and networks. Thus, when a subject matter gives rise to different stances, creates debate and controversy, it can represent a phenomenon that becomes a social representation object, that is, it can receive varied elaborations from several groups<sup>6</sup>.

In this context, it is also worth highlighting the influence of the information conveyed by the media, which builds a discursive narrative and plays an important role in the formation of the subjects' ideas and values, even creating stereotypes that are internalized by the groups and naturalized in common sense. When reflecting on the media discourse involving retirement, diverse evidence of meanings that encourage the subjects to continue working are identified, for example, naturalizing work and forms of exploitation and, at the same time, silencing the undesirable effects associated with the logic of capital reproduction<sup>13</sup>.

In view of the above, sometimes those who are entering the labor market may not worry about retirement and, consequently, do not plan for it; those who are about to retire may postpone leaving the labor market; and those who are retired may wish to return to their work activities. A research study identified that voluntary teaching after retirement is characterized as a strategy for the continuity of the behavior patterns with which the subjects were used to, which generates feelings of security, usefulness and self-recognition by maintaining an identity built in/through work<sup>14</sup>.

Corroborating the above and considering the growth of the aged population in Brazil and the 2019 social security reform, which affects this population, the studies that point to the transformations of the world of work and, above all, the struggle waged by the workers in search of the right to retirement, it can be seen that this situation already has a reserved space in the media, in the conversations and in daily work itself. In other words, this is a topic that encourages people to debate, think and rethink about various issues related to retirement, especially of other people and their own retirement process. Thus, the current phenomenon has social relevance, which characterizes it as appropriate to the study in the light of the TRS.

In addition, there are other criteria that also demarcate such phenomenon as opportune to the TRS theoretical-methodological fundamentals. This is the case of the criterion of practice, which indicates that a representation exists if it is accompanied by correspondence in the practices carried out by groups, and the criterion of holomorphosis, according to which social representations always contain references to group belonging, because they are part of social identity. In addition, the affiliation criterion stands out, according to which it is possible to delimit a social/group reality wherein a given representation exists<sup>7</sup>.

The functionalities of the TSR are also considered, such as: the function of knowledge (it allows understanding and explaining reality), identity (it situates individuals and groups within the social field), orientation (responsible for elaborating behaviors and practices) and justification (allowing the actors to explain and justify their behaviors in a given situation)<sup>6,10</sup>. Thus, in the context of retirement, the TSR contributes by revealing to workers in the retirement phase, and even to those already retired, a meaning that is sometimes unconscious and subjective about this phenomenon, thanks to the representations of the object that are forged in their minds.

### Meanings of retirement in Brazil

The TRS allows knowing the meanings of retirement from the dimension of image (objectivation) and anchorage. These socio-cognitive processes are intrinsically linked: objectification "seeks to transform something abstract into something almost concrete, to transfer what is in the imagination into something that exists in the physical world"<sup>6,61</sup>; and anchoring is the process of classifying diverse information about a social object in relation to previously existing knowledge structures; thus, social representations depend on collective memory<sup>6</sup>.

In order to analyze the meaning of retirement, it is indispensable to remember that it does not exist by itself; it is constructed and based on socio-historical relationships. In Brazil, for example, it is a phenomenon that has undergone several transformations. At the beginning of the twentieth century, workers claimed the right to retire. Currently, especially due to the neoliberal principles that have been implemented in the country since the 1990s, the same event, that is, retirement, is sometimes seen as a reason for sadness, loneliness and helplessness.

Applicability of the TSR in research studies in the field of work and retirement is reiterated, especially due to the 2017 labor reform, the 2019 social security reform and even due to the COVID-19 pandemic, which has led some workers to decide to retire. A study carried out with university professors from two federal universities in northeastern Brazil on the meanings of retirement pointed out that the strongest social representations of this group referred to this phenomenon as a new life stage, return to the family, aging, travels and leisure<sup>15</sup>. For those interviewed in the research,

the social representations of retirement were positive; however, the prospect of satisfactory work, added to the fear of social security changes and life itself, reinforce the intention to postpone retirement<sup>15</sup>.

Corroborating the above with regard to the reasons that reinforce postponement of retirement is the feeling of loss, evidenced as one of the most striking affects in the characterization of the various meanings and objects that comprise Compulsory Retirement. In addition, regarding Compulsory Retirement in Brazil, although the term is used in the context of Law 8,112/90, and refers to the criterion of retirement by age; compulsory retirement is still a topic little explored in Brazilian publications<sup>16,25</sup>. However, it is necessary to discuss the fact that, depending on age, individuals must leave their jobs and change their social status or role, assuming the position of a retiree.

Another study pointed out that a retired person can be represented as an individual who, despite worrying about their health and well-being, is a vulnerable individual most of the time, morally and financially fragile and who considers retirement as a frustrating regret since, even aware of their rights, retired workers feel powerless for not being able to guarantee them<sup>17</sup>.

In addition, it is considered that, with each social security reform in Brazil, it is possible that new meanings arise among the social groups, and there is fear about worsening of this negative perspective on retirement, even because the subtraction of workers' rights is verified with each reform<sup>18</sup>, which can contribute to the construction of negative meanings related to retirement.

It should also be asserted that, if on the one hand, the intention to retire can be linked to the idea of enjoying time and living with more quality, on the other, postponement of retirement can arise as a response to feeling active at work, not having substitute activities, and even as a strategy against idleness<sup>19</sup>. Based on this assumption, it is considered that there will increasingly be more workers who could be retired but remain in the labor market, given the relevance that the society (investigated) and the worker (inserted in the context of a given social group) attribute to the productive activity and, in this perspective, to the centrality of work, especially in capitalist societies.

For many workers, retirement has been a reason for concern due to feelings of uncertainty about life in the absence of an employment contract<sup>2</sup>. A study developed with 82 workers in the pre-retirement phase pointed out that 48.8% of the interviewees reported the desire to work after retirement and that 57.3% did not prepare for retirement. The results reinforce the importance of the retirement preparation programs, in order to assist in coping with the expectations and aspirations of this phase of the workers' professional and personal life<sup>20</sup>. Corroborating the above, it is also important to include the family in this retirement preparation process, as the experiences in the family and at work also influence decision-making regarding retirement, gaining greater importance when a pre-retired person does not have any post-career life projects, reiterating the importance of the workers' participation in retirement preparation strategies during the working life<sup>3</sup>.

It should also be considered that, even in a research study in which work and retirement are seen with a positive representation, the retirees report that they are no longer able to exercise their productive activity, mainly due to health problems that maintain a relationship both with the aging process and with the consequences of aging for work<sup>21</sup>.

### Study limitations

The short period for the data search in a systematic way is considered as a study limitation, so that other studies are suggested aimed, for example, at carrying out a systematic review of the studies produced in Brazil and that deal with retirement from the TSR perspective.

### FINAL CONSIDERATIONS

This study allowed reflecting on the contributions of the TSR to the understanding of the meanings of retirement in Brazil from the objectification and anchoring processes. However, despite the observations made, it should be considered that the potential of this theory is not limited to the aforementioned aspects, as only a few attributes were elucidated in this article.

In addition, as a contribution, the possibility of establishing dialog and approximations between different fields (Social Psychology and work; Social Psychology and health) stands out, enriching and strengthening them mutually and, above all, producing knowledge from an interdisciplinary approach that values shared knowledge.

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