# Influence of the political-institutional context on nursing professors' decision-making about retirement

*Influência do contexto político-institucional na tomada de decisões de docentes de enfermagem sobre a aposentadoria*

*Influencia del contexto político-institucional en la toma de decisiones de los profesores de enfermería sobre la jubilación*

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**ABSTRACT**
**Objective:** to understand the perception of retired nursing professors at a public university about the influence of the political-institutional context on decision-making for retirement. **Method:** qualitative research, carried out with 13 retired nursing professors from a public university in the state of Rio de Janeiro. Data were collected through semi-structured interviews submitted to lexical analysis supported by the Iramuteq software. **Results:** the lexicons pension reform, fear, salary and strike pointed to a context of uncertainty experienced by teachers which influenced the decision to retire. **Final considerations:** the decision to retire is complex, as it is marked not only by personal issues, but by the relationship that the professor establishes with work and the institution, as well as the perception he has of the social, economic and political context. In this scenario, nursing professors retire with regret and early due to the risks associated with the loss of rights.
**Descriptors:** Work; Universities; Faculty, Nursing; Decision Making; Retirement.

**RESUMO**
**Objetivo:** compreender as percepções de docentes de enfermagem aposentados de uma universidade pública sobre a influência do contexto político-institucional na tomada de decisão pela aposentadoria. **Método:** pesquisa qualitativa, realizada com 13 docentes de enfermagem aposentados de uma universidade pública do estado do Rio de Janeiro, Brasil. Dados coletados entre março e abril de 2022, mediante entrevista semiestruturada, submetida à análise lexical apoiada pelo software Iramuteq. **Resultados:** os léxicos "reforma da previdência", "medo", "salário" e "greve" apontaram para um contexto de incerteza vivenciado pelos docentes, o qual influenciou na decisão pela aposentadoria. **Considerações finais:** a decisão pela aposentadoria é complexa, pois é marcada não somente pelas questões pessoais, como também pela relação que o docente estabelece com o trabalho e a instituição, bem como pela percepção que tem sobre o contexto social, econômico e político. Nesse cenário, os docentes de enfermagem aposentam-se com pesar e precocemente, em função dos riscos associados à perda de direitos.
**Descritores:** Trabalho; Universidades; Docentes de Enfermagem; Tomada de Decisões; Aposentadoria.

**RESUMEN**
**Objetivo**: comprender la percepción de profesores de enfermería jubilados de una universidad pública sobre la influencia del contexto político-institucional en la toma de decisiones respecto a la jubilación. **Método:** investigación cualitativa, realizada con 13 enfermeros docentes de enfermería, jubilados de una universidad pública del estado de Río de Janeiro, Brasil. Los datos se recopilaron entre marzo y abril de 2022, a través de entrevistas semiestructuradas sometidas al análisis léxico con el apoyo del software Iramuteq. **Resultados:** los léxicos reforma previsional, miedo, salario y huelga señalaron un contexto de incertidumbre experimentado por los docentes, lo que influyó en su decisión de jubilarse. **Conclusión:** la decisión de jubilarse es compleja, ya que está marcada no solo por cuestiones personales, sino también por la relación que el profesor establece con el trabajo y la institución, así como por su percepción del contexto social, económico y político. En este escenario, los docentes de enfermería se jubilan con pesar y a una edad temprana debido a los riesgos asociados con la pérdida de derechos.
**Descriptores:** Trabajo; Universidades; Docentes de Enfermería; Toma de Decisiones; Jubilación.

## INTRODUCTION

The world of work has been undergoing a series of transformations, a phenomenon called "a new morphology of work" by sociologist Ricardo Antunes[1]. In the Brazilian scenario, these transformations have been based on Neoliberal ideas, which deprive workers of their labor rights through various tricks such as Pejotization, outsourcing and part-time work, among others. In this area, workers have been systematically losing job guarantees, facing new insecurities in relation to the professionals' future[2].

From this perspective, in 2016 the government presented Proposal for a Constitutional Amendment (*Proposta de Emenda Constitucional*, PEC) No. 287/2016, a legislative instrument that brought the Social Security Reform to the

agenda and culminated in changing the personal and professional plans of several workers, especially teachers who felt challenged to make any type of decision in view of the instability of governmental deliberations and, at the same time, discouraged from deciding to retire due to salary loss, as a result of the proposal to change the Social Security law[3].

In 2017, the labor reform was approved and, in 2019, the new Social Security reform was enacted through Constitutional Amendment 103. These facts evidence the progressive removal of Brazilian workers' rights and confirm Bourdieu's thesis, which considers that, in a capitalist society, the rules of the game in a social field will always be imposed in favor of the dominant class[4], despoiling workers ("the class-that-lives-from-work"[1], and that has work as a central element in life).

Thus, when considering that there are already studies[5-7] indicating the precariousness, flexibility and intensification of teaching work in Brazilian state public universities and that these aspects can lead to illness, distress and death as a result of work[8], retirement is believed to be an alternative considered by these workers to escape of this sickening work context.

Retirement can prove to be promising, as the time devoted to work before is now used to fulfill personal desires that were not possible to achieve due to the time allocated to working[9]. Retirement involves subjective and objective aspects that can result in pleasure or distress. Pleasure because retirees will have free time for leisure, to dedicate themselves more to their family, and to indulge in practices and studies that they always wanted but never had time to do so in their everyday life. On the other hand, it can result in a reduction of material earnings and generate feelings of uselessness and loneliness, as well as breaking the friendship bonds that they had during their working time[10-11].

In addition to the above, it is to be noted that the meaning attributed to retirement is based on socio-historical, political, economic and institutional relationships and that the factors which influence the decision to retire can be personal, family-related or associated with the macro-context (social, work, political and financial)[12]. Therefore, the decision to retire involves complex situations that range from workers' health to political and institutional guidelines, evidencing that it is a complex and multifaceted decision.

Thus, the objective was to understand the perceptions of retired Nursing professors from a public university about the influence of the political-institutional context in choosing to retire.

## METHOD

This is an exploratory-descriptive study with a qualitative approach, which considered the criteria set forth in the *Consolidated Criteria for Reporting Qualitative Research* (COREQ) tool for the development and description of qualitative and descriptive research.

A public university located in the city of Rio de Janeiro, Brazil, was chosen as setting for this study, where the first concerns about the theme and the interest in this research arose.

The time frame (from 2017 to 2021) considered the political and social contexts, which might impact on the teachers' decision to retire: labor reform (2017)[6], change of government (2018)[6], Social Security reform (2019)[6] and the pandemic of the disease caused by the type 2 coronavirus (COVID-19)[7] in 2020. In relation to the pandemic, this time divider was based on the understanding that many teachers had their work processes modified, needing, for example, to update themselves in relation to the use of information and communication technologies required in the remote teaching context.

Retired Nursing professors between 2017 and 2021 were invited to participate. We considered the following exclusion criteria: Nursing professors who reached retirement in a period prior to six months, believing that this is a minimum period to familiarize with the routines established after retiring.

It is noted that the participants were recruited using the Snowball technique[13], and that contact with new participants was interrupted when empirical and theoretical data saturation was reached.

The initial contact was made by telephone (via the *WhatsApp®* app) for a brief presentation of the study and, if there was interest in participating, a semi-structured interview was scheduled, mediated by virtual technology.

Data were collected between March and April 2022 using a form to characterize the participants' profile and a semi-structured interview script to guide the conversation and ensure achievement of the objective.

Data from the form were organized and treated using descriptive statistics. The interviews were recorded and stored in audio, and their data were subsequently transcribed in full in electronic text format, so that they could be evaluated through lexical analysis.

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The lexical analysis was carried out from data processing by means of the *IRAMUTEQ®* (*R Interface pour les Analyzes Multidimensionnelles de Textes et de Questionnaires*) software, via Descending Hierarchical Classification (DHC). In this type of analysis, the treated material (text *corpus* – set of interviews) is divided into classes that present vocabulary similar to each other and, at the same time, different from the one expressed in the other classes. In addition, each class also presents the most repeated terms and meanings in that class. Not to mention that it allows analyzing text segments, that is, making it possible to identify the contexts in which these terms appeared, thus allowing the creation of meaningful connections[13].

It should also be noted that IRAMUTEQ is a support software program for qualitative research studies that performs various statistical calculations (from the R software), such as the chi-square test ($x^2$), one of the most used distributions in inferential statistics, mainly for quantitatively evaluating the relationship between the result of an experiment and the expected distribution for the phenomenon. In other words, it highlights the certainty degree with which the observed values can be accepted as governed by the theory in question.[14,15]

For being a research study involving human beings, the project was appraised and approved by the Research Ethics Committee (*Comitê de Ética em Pesquisa*, CEP) of the institution involved. It is emphasized that data production was only initiated after each participant's acceptance, that is, after reading and signing the Free and Informed Consent Form. The testimonies were coded to preserve the participants' anonymity, using the name Prof (professor) followed by the interview sequence number.

## RESULTS

Thirteen Nursing professors took part in the study. Of them, eleven (81.8%) were female and two were male. The participants' age varied between 56 and 69 years old, with a mean of 64.

The net income declared by the research participants, when considering the earnings as retired professors at a public university, ranged from seven to 15 minimum wages and from one to four people depended on this income. In addition, four participants had two pensions (one as a nurse and one as a teacher) and five participants claimed to have a private Social Security benefit, as a way of complementing their income.

When considering the interviewees' degrees, 11 were PhD professors and two were MScs. Regarding progression in the teaching career, the majority (eight participants) were deputy professors, three were assistant professors, one was a full professor and another one was an associate professor.

The text *corpus* was comprised by 13 texts (interviews), which were divided into 686 text segments. Of these, 569 (82.94%) were used and divided into five classes that, after text analysis, were named by the authors considering the text content and the theoretical framework. The class that meets the objective of this study was the largest, represented by 130 text segments (22.9% of the material used) and called "Uncertainties and insecurities that permeate the decision to retire".

The most frequent terms in this class were Social Security reform ($x^2$ - 53), fear ($x^2$ - 49) and wage ($x^2$ - 38.4). The following terms also appeared in this class: contribution ($x^2$ - 22.1); right ($x^2$ - 19.6), age ($x^2$ - 18.9), parity and uncertainty (both with a $x^2$ value of 17). Finally, it is also worth mentioning the term strike ($x^2$ - 12.75).

By retrieving the typical segments of this class, three subtopics were identified: Fear of the Social Security reform; Insecurity about guarantee of rights; and the strike that marked the university.

### Fear of the Social Security reform

During the period in which the Social Security system reform in Brazil was discussed, this generated a feeling of fear among professors and, whether directly or indirectly, strongly contributed to their mobilization in search of retirement.

> *I know several colleagues from federal universities who retired in a hurry, afraid of the Social Security reform. It was also not what I wanted, in fact, at that moment, I was feeling forced to do that, for my family, for myself. (Prof. 1)*
>
> *I've seen many professors retiring lately, because they already had the service time and because of these Social Security reform issues. (Prof. 12)*
>
> *I experienced a phase in which many teachers, afraid of the Social Security reform, took early retirement; it's as if they didn't want to bet on what was ahead and decided to retire. (Prof. 9)*
>
> *I think that my generation was marked by a political context that brought about many uncertainties and certain reconfiguration of what is actually thought of public service. (Prof. 4)*

**Insecurity about guarantee of rights**

The data analysis allowed verifying that, aware of the Neoliberal logic and the history of removal of rights with each Social Security reform, teachers felt insecure about the guarantee of their rights at a crucial moment in life: retirement. This situation can be verified in the following text segments.

> *I was afraid of losing my rights. The State and I, not only in Rio de Janeiro, but the Brazilian State, has showed this loss of rights a lot and I was at risk of losing parity. (Prof. 2)*

> *In the federal system, I even got four changes in retirement, four Social Security reforms. Here at the University, what stuck was the Exclusive Dedication issue, whether or not it would be considered in the base retirement salary. (Prof. 10)*

> *Workers gradually lost the right and that's very sad. (Prof. 13)*

**The strike that marked the university**

In addition to fear and insecurity about the Social Security reform, the history of strikes, and especially the afflictions experienced by the professors in the strike from 2015 to 2017 that which devastated the university, were also latent and influenced the decision to retire.

> *A little before this whole Social Security reform thing, there was also a strike. Those were the worst periods of work, we earned no wages, a long period. I know that many colleagues borrowed money from each other to pay living expenses. (Prof. 08)*

> *The University went through a complicated period of strikes, no wages earned. Many people started to reduce their workload due to this story of lack of salary, it was a difficult period. (Prof. 06)*

## DISCUSSION

The discussion on the data related to the participants' profile is presented jointly with presentation of the themes, as it establishes a close relationship with the aspects discussed.

In Brazil, the 1988 Federal Constitution (CF/88) establishes the Social Security system as the main social protection instrument[16], comprised by the Social Security, Social Assistance and Health triad. In this context, it is noted that Brazilian Social Security encompasses three systems: i) General Social Security System (*Regime Geral de Previdência Social*, RGPS), in which anyone who wishes to be insured can enroll, as it is a contributory regime and with mandatory membership for workers governed by the Consolidation of Labor Laws (*Consolidação das Leis Trabalhistas*, CLT); ii) Own Social Security System (*Regime Próprio de Previdência Social*, RPPS), which regulates the Social Security laws of civil servants from a given federative unit; and iii) Complementary Social Security System (*Regime de Previdência Complementar*, RPC), of a private nature and optional enrollment, which is intended to supplement workers' official incomes[17].

Over the years, these three regimes have undergone changes and the reforms and counter-reforms implemented have increasingly restricted the guarantees related to the retirement of Brazilian workers, including teachers[18]. Corroborating the findings of this research, a study conducted with university professors[18] verified that PEC No. 287/2016, referring to the Social Security Reform Proposal, was the main influencing factor for leaving the university.

Therefore, it is observed that the setbacks arising from the reforms reveal an agenda marked by dismantling rights and a place of growing legal uncertainty for workers as part of the work increasing precariousness process[19]. Insecurity in relation to permanence or not of the labor rights, instability and precariousness in employment contracts have repercussions on workers' physical and mental health, although it is difficult to state that diseases, especially psychosomatic ones, are symptoms of workers who experience these circumstances of helplessness and lack of social protection[20].

It is believed that the recent Social Security reform is considered the most unfair to Brazilians and the one that most increases risks to vulnerable groups such as women and older adults[18,21]. This aspect is undoubtedly worrying since, in the retirement phase, most Nursing professors are aged women who have been following the reform processes since the 1990s and suffering from budget cuts and disinvestment in public education in favor of privatization measures, which comply with the logic of international organizations.

In addition to the changes in the legal provisions related to the Social Security reform, the professors that took part in this research were also concerned about parity and the incorporation of exclusive dedication to their retirement earnings.

Parity means ensuring readjustment of the benefit to inactive public servants, as is the case with the remuneration of active public servants[22]. In turn, in the scenario under study the Exclusive Dedication (ED) regime can be adhered to or not by the professors, and is the one that prevents them from exercising another paid activity, whether public or private, with the exception of those provided for in Law No. 12,772/ 2012, while active. The research professors brought

to light an institutional dilemma about the incorporation or not of the amounts received due to the ED in retirement earnings. This situation was pacified with Law No. 8,267/2018, which guaranteed that public servants who adhered to the ED regime would have the effective ED implementation in their retirement earnings[23].

It should be noted that four participants reported enjoying two retirements. This fact is possible, as Article 37 of the Federal Constitution[24] admits the accumulation of two professorships, a professorship with another technical or scientific one, and even two private positions or jobs as health professionals, provided that hour load compatibility is verified. Thus, when leaving work, teachers will also be able to enjoy both pensions.

In this study, only five participants claimed to have a supplementary (private) Social Security plan. A study carried out with professors asserts that these workers do not materially prepare themselves, foreseeing ways to increase earnings in advance of the expected retirement date, even when they recognize the need to think about it[25]. On the other hand, a research study carried out with workers in the private sector showed the opposite result, as most of them plan to supplement their retirement income through a Private Pension[26].

It is also worth highlighting the impact on teachers caused by the strike that marked the university. The researched university has a history marked by several strikes; however, the one mentioned by the participants referred to the one that affected the university from 2015 to 2017, considered one of the worst crises in its history. This period was characterized by the enormous State fiscal crisis, with repercussions on health and education, which caused a deficit in revenue directed to the University, resulting in the suspension of various payments, from those related to professors (wages) and students (monitoring grants, scientific initiation, etc.), as well as maintenance services (provided by outsourced companies), among others[27].

This situation drastically affected the teaching, research and extension actions developed by the university. In 2016, for example, the Pedro Ernesto University Hospital belonging to that university had to discharge hospitalized patients who were not at risk of death. And in the same year, the professors decided to go on strike wage regularization, for the payment of scholarships, for wage adjustment, and for the allocation of 6% of the state budget to universities[27].

The strong crisis that the university went through was harmful for the entire academic and working community. The high rate of faculty leaves (definite and temporary) was a reflection of this troubled period and shows that the university reached a peak of 2,916 professors in 2016 but, due to the funding crisis faced by the university, this number was reduced to 2,734 until 2019 due to retirements and exoneration requests[28].

In addition, it is worth considering that, if on the one hand, the mobilization of teachers, students, administrative technicians and other employees, combined with the strong solidarity of society, was very important during the resistance process in the midst of the strike[27], on the other hand, the teachers' challenges did not end when the strike finished; on the contrary, the subsequent years continued to be marked by new struggles, as already presented.

Thus, unlike what was identified in a study conducted with professors from two federal universities in northeastern Brazil, the participants in this research did not express the intention of postponing retirement; on the contrary, they saw themselves impelled to anticipate it[25]. This situation denotes how difficult and uneasy the end of a university professor's career can be[9], motivated by issues of the most diverse natures.

Another factor that establishes a relationship with this fact is the participants' age: it is noted that, depending on the age criterion, retired professors could still remain in the service for longer periods of time, in case they expressed interest. After all, compulsory retirement, that is, the obligatory transition of public servants from activity to inactivity, only occurs when they turn 75 years old, regardless of gender.

It is also worth noting that the participants were highly qualified professors and that leaving the university early in time exerts an important impact, especially considering the competencies and skills they have for graduate teaching. In Canada, faculty retirement has been a growing concern for the Nursing education community due to the impact it may exert on preparing the future Nursing workforce.[28]. Although the Brazilian reality is different, this experience should serve as a warning[29].

It is necessary to be attentive to the institutional aspects that discourage continuity of the teaching work and that may be associated with the turnover of Nursing professors[9]. Among the aspects that involve this demotivation, we can mention the following: wages below the needs and expectations of the professional collective; high work demand with diversified activities involving teaching, research, extension and pedagogical management; and distressing activity in which recurrent use of voice and a standing position is required, among others. Finally, in the case of Nursing, in addition to the ability to teach theoretical classes with always current content, these professors also lack practical classes and follow-up in the internship field, which also demands psychomotor and affective skills to develop this task[30].

As a contribution of this study, there is the fact that it brings to light the legitimate concern of those who have dedicated themselves to studying aspects related to work, training and education in health, and particularly in Nursing, namely: the concern with the imminent exodus of "senior" professors or those who hold the highest levels of the career and the need to prepare younger professors for career advancement. And, yet, the need for the State and Higher Education Institutions to improve policies, programs, services and actions, in order to turn the transition "from work" to "retirement" into a more positive and less traumatic experience.

### Study limitations

It is understood that the limitation of this study lies in the impossibility of generalizing the results, as there is political and institutional specificity inherent to the place and the researched university that may not be similar to other Brazilian regions and Higher Education Institutions. However, it is noted that this research can serve as an incentive for similar studies, even from a multicenter perspective.

### FINAL CONSIDERATIONS

The decision to retire involves several factors but, especially in this study, the threat to material survival emerged. In this perspective, the loss of labor rights such as parity and the non-incorporation of ED in retirement drove the decision to retire. In this scenario, Nursing professors retired with regret and early in time due to the risks and harms associated with the loss of rights.

Other aspects that stimulated the decision to retire were the wear out and psychological distress experienced resulting from the context of the fiscal recovery experienced in the state of Rio de Janeiro, as well as the uncertainties about maintenance of the wages and other activities relevant to the work process at the university. Marked by significant resistance from the teaching collective and political struggles, this period resulted in prolonged strikes, was exhausting and exerted a negative impact on people's subjectivity.

Another important result related to age is highlighted, in which many of the professors retired, although some of them were not yet aged or close to compulsory retirement. Thus, it is concluded that it is necessary to implement institutional policies aimed at maintaining this highly qualified workforce in universities, by means of adequate working conditions, safe work contexts and social and professional appreciation of these professionals.

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