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A Marxian Review of Gerontological Literature

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A major concern for the sociology of aging and social gerontology is the lack of theoretical rigor. In particular, Birren and Bengtson (1988) describe all of social gerontology as "data-rich but theory-poor." In an effort to deal with the lack of theory, this essay reviews the general social gerontology literature from a Marxian perspective. The findings suggest that the Marxian framework can illuminate aspects of social gerontology hitherto left unexamined in both the academic and applied arenas.

In the light of recent events in Eastern Europe and the former Soviet Union, a reasonable question might be asked, "How relevant is a Marxist theoretical framework?" Sociologists such as Hollander (1990) are highly critical of the continued use of the Marxian framework in academic circles. Some contemporary Marxists feel they must respond to statements like: The Berlin Wall is no more. *Perestroika* will soon be included in English dictionaries. The "analytic Marxists" greet what has been called the "crisis of Marxism" with a zealous joy. Wright (1989a, p. 36) articulates his belief that Marxism is in a period of "theoretical transformation" and will emerge from this state with greater explanatory power. He also refers to this new emerging Marxism as "more politically relevant" suggesting that the framework will be an even more effective tool for community organization and advocacy. In his elegantly written essay, Bowles (1990, p. A56) notes that the slogans being used in Eastern Europe

come from neither the *Communist Manifesto*, nor from *Wealth of Nations*. There is a plea for citizens to be able to participate in the economic and political decision-making process. Contrary to the emphasis in most of the American press on markets and capitalistic institutions, Bowles interprets these Eastern European pamphlets as being similar to the "Declaration of the Rights of Man" and Tom Paine's "Common Sense." He states that the crowds in Prague and Moscow have nothing in common with the Bolsheviks but are more reminiscent of "Berkeley in 1964 or Paris in 1968." Marxists from the "analytic school" contend that it is time to fine tune and retest the perspective, not a time to bury it (Burawoy, 1990). Efforts to test and refine the Marxian perspective are likely to appear throughout the academic world in this decade. In this paper, we argue that the application of Marxian theory can illuminate aspects of social gerontology hitherto left unexamined.

Marx's program for overcoming oppression includes organizing the oppressed and engaging them in active struggles with their oppressors, all the while helping them to become aware of the contradictions inherent within the capitalist system and of the necessity of overthrowing the system itself. Literature in social gerontology that has utilized contributions from Marxian theory does not specifically question the relevance of Marxism's fundamental assumptions (Marson, 1991a). This paper fills this gap.

In order to apply the Marxian framework to social gerontology it is necessary to successfully accomplish three tasks. These include:

- Meeting theoretical prerequisites
- Fine tuning the framework to meet the need of gerontologists
- Applying the framework for advocacy

Theoretical Prerequisites

In order to effectively utilize the Marxian framework for social gerontology, three theoretical prerequisites must be met. They include:

- Conflict must exist
- Conflict must be materialistic in origin
- Conflict must occur between two opposing groups

Existence of Conflict

Conflict, in Marx's writing, is the very driving force behind social change. Demarcation lines are drawn between contending classes, capitalists and workers, with conflict emerging from struggles over the control of over the means of production. Conflict is well noted in the social gerontology literature. At least three scholarly bibliographies (Frazier and Hayes, 1991; Johnson, O'Brien, and Hudson, 1985; Marson, 1991b) and one scholarly journal (*The Journal of Elder Abuse and Neglect*) exclusively address this issue. Popular literature on aging also frequently addresses conflict (i.e., Clift and Hager, 1989; Dwyer, 1989; Moore, 1985; and Paulson and Goldwasser, 1989).

Materialistic Origin

In traditional Marxism, conflict is generated by the control over the means of production. Some—but not all—neo-Marxists have retained this view. Because of retirement, elderly people have little to no direct participation in economic productivity. Thus, in social gerontology, "control over the means of production" has little relevance.

Wright (1989b), a prominent figure in neo-Marxian analysis, has moved away from "control over the means of production" and toward to using "material interest" as the center-piece for Marxian analysis. It is extremely difficult to find a concise definition of *material interest* either within Marx's own writings, or those of his contemporary interpreters (Wright, 1989b, p. 205 in footnote). A new conceptual definition of material interest should be constructed for the sociology of aging. In the capitalist mode of production, just as in all other precommunist modes, material interest is the tie that binds people into society, while the strategies employed to pursue material interest are the ties that bind people into social class. Conflict emerges between social classes because *all* are pursuing the same material interest. Within each social class there are distinctive strategies. Thus, social classes can be identified on the basis of *relative* strategies

of pursuing material interest. The central goal for each strategy is to maximize wealth while minimizing the efforts needed to gain it. The classic strategy noted by Marx (1967) is to gain wealth by limiting the amount of potential wealth of another class—"less for you, more for me." As capitalism becomes more sophisticated with the flow of history, the various strategies employed become more difficult to identify and analyze even though their objectives remain the same. A detailed illustration of the historical development of these strategies is available (Marson, 1991a).

Existence of Social Groups

The issue of whether the aged constitute a real social group, rather than a mere aggregate, is complex, but it is of fundamental importance for the application of a Marxian framework to the study of aging. Marxists identify group (class) awareness as a fundamental prerequisite for collective struggle. In fact, any conflict theory requires that there be at least two opposing groups, aware of each other's presence and identity in order for conflict to take place. The problem in the sociology of aging is a lack of any clearly delineated opposing sides (Minkler, 1984).

Marxian inspired writing has addressed this concern by making polar opposite conclusions. Estes (1979) and Olson (1982) begin their independent analyses with the assumption that elderly people constitute a social group that separates them from younger people. The literature offers several illustrations of this phenomenon (Braddy and Gray, 1987; Love and Torrence, 1989; Marson, 1983). Whereas, Dowd (1980) and Phillipson (1982) begin their analyses with the assumption that elderly people constitute an aggregate—not a social group. Dowd (1980) and Phillipson (1982) independently contend that a Marxian analysis of conflict should occur within the context of social classes in which elderly people are included. The literature also supports the existence of this phenomenon (Calasanti, 1988; Stoller and Stoller, 1987).

The debate that emerges out of the work of Estes (1979), Olson (1982), Dowd (1980), and Phillipson (1982) forms a point of departure for our analysis since it illuminates how social gerontologists have found the Marxian framework fruitful for

making sense of their data. The issue of which side in this debate is "correct" is beside the point; however, the interested reader should consult Marson (1991a) for a detailed discussion. For our purposes, the debate facilitates the identification of at least three locations where Marxian analysis is appropriate. These locations include:

- subculture by age alone;
- age nesting within social class;
- age crossing social class.

The Three Conflict Locations

A *wide* variety of Marxian perspectives are available for general analysis.¹ Thus, it is not surprising that our discussion should include three mutually exclusive perspectives. The identification of three perspectives is meant to illustrate that Marxian analysis is rich with ideas that can illuminate the wide range of social gerontology literature—a literature that is theoretically barren (Birren and Bengtson, 1988; Lipman and Ehrlich, 1986; Maddox and Campbell, 1985; Marson, 1991a). Identifying which perspective is most fruitful is a testable research question. The purpose of this paper is layout ideas in order to be tested.

Subculture

Rose's (1965) work on subculture theory provides the foundation for the work of neo-Marxists in the sociology of aging.² Although not influenced by Marxian theory, he was the first to address the issue of elderly people as a social group when he suggested that a subculture of senior citizens will emerge whenever members of one category interact more among themselves than with people from other categories.

Both Estes (1979) and Olson (1982) concur with Rose's original idea when they begin their Marxian analysis with the assumption that elderly people constitute a social group with a unique consciousness that separates them from younger people. Estes focuses upon and reviews contemporary social and economic programs while Olson follows the historical explanation of the emergence of social programs for elderly people.

Bengtson *et. al.* (1985) strengthens the argument for the subculture perspective when they analyze the literature and suggest that elderly people are in a historical period of great social change. The social structure is moving from a period in which there was little or no collective consciousness among elderly people to a period in which there will be group cohesion. Bengtson and his associates contend that Rose's subculture theory was ahead of its time. There is little evidence of a subculture in the past; some evidence of it in the present; and stronger evidence that suggests that it will exist in the future. Two succeeding editions of a leading text book (Harris and Cole, 1980; Harris, 1990) show a trend supporting Bengtson. In the first edition, Harris and Cole (1980) are quite critical of Rose's theory of subculture. After ten years of research and literature review, Harris' (1990, p. 173) position changed.

From the subculture perspective, the cleavage is located between the young group and the old group. That is, the *Younger Cohorts* are in conflict with *Older Cohorts* because of material interest which oppose each other. The non-Marxian literature supports the existence of such conflict. Braddy and Gray (1987) demonstrate that younger job applicants are given preference, even though such a procedure is clearly illegal. Preston (1984) takes a different view when he addresses the potential conflict between young and old cohorts on the basis of "transferring resources to dependents." He suggests that with continuing limited resources, dependent children are more likely to go "wanting." Elderly people have more political clout. In Preston's (1984, p. 446) words, "children don't vote; and adults don't vote on behalf of their children. . . . If we passed through life backwards, adults would insist that conditions in childhood be far more appealing." McCall (1991) extends Preston's work by linking the transfer of resources to suicide rates. Although not in total agreement with Preston's analysis, she finds that rising suicide rates among the young are "associated with a deteriorating state of well-being for adolescents;" while the declining suicide rate for elderly people is associated with improved resources for them. Such studies support the argument that the conflict is between the cohorts. The cleavage between cohorts is the result of conflicting material interests.

Social Class Conflict

Dowd (1980) contends that elderly people cannot be perceived as a separate social entity even within a Marxian analysis. He points out that our capitalistic society divides elderly people into two social classes: the *haves* and the *have nots*. Phillipson (1982) argues that elderly people cannot form a true social group or subculture. She contends that social class forms the primary lines of social cleavage. She frequently quotes directly from Marx who insists that longevity is a characteristic of the "ruling class."

Riley (1985) supports the proposition that the study of conflict in social gerontology is based on social class interests of elderly people. Any variation of the class interest theme projected by an elderly person is the result of self interests. In more complex and more precise terms, Riley contends that the values and interests of each successive age cohort are founded on a unique encounter with history. From the history of the cohort emerges the potential for a group (or age) consciousness. Contrary to Rose's original position, Riley makes clear that most cohorts are not likely to develop a group consciousness founded on age. Even though there are shared experiences and values because of common history, there are many social factors which create division. Gender, race, and most importantly, socioeconomic factors create division among senior citizens that will impede a subculture as Rose hypothesizes.

Marxian analysis for social gerontology illuminates two different arenas for social class conflict. First, conflict can be nested within, rather than crossing class lines. That is, conflict emerges between two age cohorts within the same social class. Second, class conflict can be found among elderly people. That is, elderly people face conflict across class lines within their own age cohort. Both of these perspectives are appropriate points of departure for Marxian analysis.

Conflict Nested in Social Class When we speak of conflict nested in social class, we are referring to conflict over the material interest in which a younger generation competes with an elderly generation of the same social class. Little is written about this conflict, however, the line of division is most likely to

follow the demarcation between *core* and *peripheral* sectors of the dual economy. The *core* sectors consist of firms that are large, oligopolistic, highly profitable, unionized, and higher paying. The *peripheral* sectors consists of smaller, more competitive, marginally profitable, nonunion, and low paying firms. Mueller, Mutran, and Boyle (1989) offer an impressive work in the sociology of aging. They clearly demonstrate that aging workers in core sectors face the greatest amount of discrimination from younger workers who share the same social class. *Core sector* older workers have more to lose in their retirement benefits than *periphery sector* older workers. In the end, *core sector* workers face significantly greater age discrimination because they are a greater threat to younger workers of the same socioeconomic status. A proposition can be formed: The greater the material wealth possessed by older workers, the greater the efforts by younger workers to struggle over that wealth.

Conflict between Social Classes Conflict between social classes comfortably fits into traditional Marxian analysis. Crystal and Shea (1990) provide evidence for the existence of this cleavage when they report that the *have nots* (the poorest one-fifth of the elderly) receive 5.5% of the elderly's resources, whereas the *haves* (the richest one-fifth) receive 46%. Stoesz shows that money can buy the best health care. In concluding his analysis he (1989, p. 30) states, "the gray market is likely to divide into two clearly demarcated systems of eldercare: the affluent elderly enjoying the generous care of completely—some would say excessively—provisioned life care communities: the poor elderly dependent on the squalid institutions willing to accept government payment for care." However, the most convincing support for the existence of this phenomenon is found in recent news reports (Clift and Hager, 1989; Dwyer, 1989; and Paulson and Goldwasser, 1989). In 1988, Congress passed the *Medicare Catastrophic Coverage Act*. The intention of the Act was to avoid the financial losses and humiliation faced by elderly people who must sell all their life possessions and become welfare recipients when catastrophic illness strikes. The benefits were impressive. However, because of the huge national debt, a surcharge was attached. Middle and upper class elderly people were required to pay for the protection. The *National Committee*

to Preserve Social Security organized their 33 million members to demand an unprecedented repeal of the Act. The Act, of course, was repealed in 1989 and immediately thousands of elderly people were required to sell all their belongings and become welfare recipients. Critics of Congress (Clift and Hager, 1989) referred to the repeal as "government by those who yell the loudest." The wealthy were in battle with the less affluent, or from a Marxian perspective, cleavage could be located on the basis of material interests of social class.³

Application and Advocacy

At least three theoretical locations of conflict exist for the Marxian analysis of aging: a) subculture by age alone; b) age nesting within social class; c) age crossing social class. These locations would not have been identified without the use of the Marxian framework. Existence of each axis of conflict has empirical support and each deserves further analysis. Which of these axes of conflict becomes critical at any particular point in time may be dependent upon specific historical events and swings of public policy. Additional research is needed and must be based upon the identification of variables that are of interest to social gerontologists but which are also theoretically meaningful for the Marxian framework. Two variables that are particularly important include: health and life satisfaction.

Health

Scattered throughout the first volume of *Capital*, Marx makes reference to the linkage among health, exploitation and social class. "*Après moi le déluge!* is the watchword of every capitalist and of every capitalist nation. Hence capital is reckless of the health or length of life of the labourer, unless under compulsion from society" (Marx, 1967, p. 257). Because of the exploitation inherent in the capitalist economy, workers simply did not live long enough to be labeled "elderly." Gerontologists continually find that socioeconomic status predicts health (Bergner, 1985; Chapman *et. al.*, 1986; Ferrini and Ferrini, 1989; Hendricks and Hendricks, 1985; Lazarus, 1988; Seccombe, 1989).

An individual may be biochemically predestined to live to 90, but his working class status in an asbestos factory might cut off his life at 55. Schwalbe and Staples (1986) use a Marxian inspired class measure to effectively predict health effects for the working class. Health status is an integral part of the Marxian framework and offers a theoretical foundation in which level of health can be used as a variable in sociology of aging research. Marson (1991a) demonstrates that a Marxian inspired social class index uncovers a possible spurious relationship when the more mainstream SES [socioeconomic] measure is used to predict health level.

Life Satisfaction

Although life satisfaction may be the most widely studied phenomenon in social gerontology, it is a concept without a theory (Sauer and Warland, 1982). Okun (1987, p. 401) defines it as, "an abstract, superordinate construct entailing the affective reactions of individuals to their life experiences along a positive-negative continuum." Neugarten *et. al.* (1961) may have been the first to operationally define it as a self-report inventory and see it as the self-acceptance one projects upon reviewing one's life. The inherent attraction to life satisfaction in gerontological studies seems to emerge from the negative image younger people have of the aging process. What factors contribute to life satisfaction for an aggregate that is constantly confronted with physical, psychological and social losses?

Perhaps the most routine independent variables used by sociologists to predict life satisfaction are socioeconomic status and income level. Although most of the life satisfaction studies "lack the use of mainstream social science theories to guide research" (Okun, 1987), they tend to support the importance of material resources as a significant factor of prediction. This general tendency supports the Marxian perspective. Those who *have* are going to be more satisfied with their life circumstances than those who *have not*.

Level of health is another common independent variable that sociologists use to predict life satisfaction. Such research also has a tendency to be theoretically implicit. For example, Ferrini and Ferrini (1986) have written a comprehensive monograph that is intended for use in the social sciences. It includes

an entire chapter on "biologic theories" but does not include a conceptual framework that explicitly embraces the concept of health from a social science perspective. Kovar (1987, p. 302) notes that there is "no consensus" for a conceptual definition of health among social gerontologists. In social gerontology, health and life satisfaction share a common characteristic—they are both concepts in search of a theory. Notwithstanding the implicit theories from which these concepts may have emerged, they seem to fit well into the Marxian framework.

There is massive evidence that demonstrates a quantitative linkage between health and life satisfaction. Chatfield (1977) offers the simplest model when he suggests that health is an intervening variable. His model can be illustrated as:

INCOME —→ HEALTH —→ LIFE SATISFACTION

Chatfield among others (Fengler, Little & Danigelis, 1983; Liang, 1982; Mancini, 1981; Markides & Martin, 1979; Seleen, 1982; Spreitzer, Snyder & Larson, 1980; Tai, 1978) suggest that increased income affects level of health and, in turn, better health affects life satisfaction. From a traditional sociological perspective these authors are saying that the wealth associated with socioeconomic status offers greater opportunity to have access to the health care delivery system. In simple terms, money can buy good health. These authors fail to consider the enormous investment made by the state for health care of those who do not have sufficient funds to pay for such care. The state's efforts were made to equalize health so that income would not significantly predict level of health. Marx states that level of health is an effect of class. The exploitation and oppression of the working class limits its ability to have meaningful satisfaction in later life because its members are compelled to work in areas that undermine physical health. For example, Kogevinas (1990) demonstrates that poor people are more prone to cancer, and less likely to survive it.

Several factors enhance the use of life satisfaction as a dependent variable in sociology of aging research that is Marxian inspired. They can be divided into two general categories, philosophical and theoretical.

Philosophically, both Althusser (1969, p. 13) and Conway (1987, p. 30) state that Marx's earlier work was humanistically focused. Marx is preoccupied with human misery in relation to the capitalistic economy and believes that communism relieves misery and reinstitutes freedom and happiness among the proletariat. Marx's goal is to produce a society that promotes happiness among its citizens. Soper (1981, p. 11), for example, contends that Marx implicitly asserted that "'happiness' of human beings is a good thing." Structuralists will have problems with her highly humanistic interpretation of Marx's work. We do not think that Soper's interpretation is stretching the framework to its' breaking point. Using life satisfaction as a dependent variable seems appropriate.

Health as a variable holds together Marx's concept of social class and life satisfaction. As stated earlier, level of health is a major theme throughout the original writings of Marx. He sees the capitalist economy as having a major influence on the health of the working class. Health is also a major variable in the explanation of life satisfaction in the theory-free research in the sociology of aging. Marx provides the theoretical linkage between these two important variables for the sociology of aging.

As a Framework for Advocacy

The first popular recognition of the inherent contradictions between the capitalist economy and elderly people occurred under the critical eye of Maggie Kuhn. At age 65, she was forced to retire from her position as a social worker—a career she dearly loved. Retrospectively, she (Kuhn, 1987) describes herself as being "anxious and depressed" when the reality of decreased income was set into her consciousness. As a social worker, she had years of training and experience in organization and advocacy skills. Because of these experiences, she impulsively wrote a memo to friends who faced the same situation. They began to meet as a group. Maggie Kuhn (1987) writes, "We could take risks together in our own supportive community. We could reach out to others and organize for change. We could be risk takers with nothing to lose but our fears and isolation!" Kuhn's memo ushered in the birth of the *Gray Panthers*. This is

reminiscent of Marx and Engels' (1967) words, "The proletarians have nothing to lose but their chains. They have a world to win. Working men of all countries, unite!"

Kuhn (Kuhn and Sommers, 1981) is well known for her articles and speeches about advocacy for aging people. In one of her earliest articles, she (Kuhn, 1979) outline stages that senior citizens can follow to gain control of their own social and economic destiny. Her stages have a Marxian flavor with the possible exception of two themes. First, Kuhn realizes that a violent revolution cannot be considered and change has to be implemented through the democratic process. Second, Kuhn is also well-known for enlisting professionals by appealing to their ethical standards of practice. She (Kuhn, 1978) often outlines responsibilities that professional groups have for their elderly clients and obligates them to take action. Her efforts paid off. The Gray Panthers spearheaded efforts to end mandatory retirement and saw the fruits of their labor in the 1986 *Amendment to the Age Discrimination in Employment Act*.⁴ Hudson and Strate (1985) suggest that the Gray Panthers will cease to exist after major goals are accomplished. If the Gray Panthers' social concerns are limited to material interests of elderly constituents, Hudson and Strate probably will be correct in their prediction. However, the Gray Panthers articulate many concerns [i.e., the Viet Nam War] that facilitate unity among many oppressed groups.

Kuhn is well aware that merely organizing a group of people who were forced to retire does not produce sufficient power to facilitate change. Coalitions have to be established with central themes. Becoming "aged" is the only group that everyone is facing, thus many non-aged people are joining the ranks of the Gray Panthers. Maggie Kuhn and the Gray Panthers recognize that the economic structure that promotes the division of class is an extremely powerful force that will inhibit the development of a consciousness of kind among senior citizens. The strategies that are the centerpiece of the Gray Panthers' can be summarized as efforts to: 1) join with other oppressed groups who recognize their oppression under the economic structure; 2) demonstrate that most Americans will become elderly and therefore suffer economic oppression.

Kuhn apparently recognizes the handicap of using Marxism as an advocacy tool. Marxism has negative connotations because of the “popular” association between Marx and eastern communism. We will not read about the Marxian influence on the strategies employed by Maggie Kuhn. With training in social work, there is no doubt she is familiar with Marx’s work. A combination of forces, including the ideological hegemony of this country’s capitalist class, the Cold War, propaganda from religious groups, and even the historical predominance of the British cultural tradition of individualism have effectively convinced the masses of the inherent evils of Marxism. Marxism is connoted as being an oppressive and authoritarian system that leaves little room for individual free thought and expression. Current events in Eastern Europe reinforce this perspective. The Gray Panthers could have never successfully established a coalition by actively announcing their subscription to Marxian ideology. College students are often excited by Marx’s theoretical framework—until they learn that Marx was the father of the perspective. Maggie Kuhn suggests that a Marxian framework has been successful in advocating for senior citizens as long as the strategies are not connected with the name *Karl Marx*.

Summary

It is not necessary to consider oneself a Marxist in order to find that the Marxian framework adds to the knowledge base for social gerontology. In particular, the framework facilitates the process of identifying at least three types of social groups among elderly populations:

- subculture by age alone;
- age nesting within social class;
- age crossing social class.

The social gerontology literature [which is, at best, theory-implicit] demonstrate sources of conflict for each group-type. This knowledge provide a guiding force for further study. The Marxian framework also seems to able to provide theoretical linkages for key concepts in gerontology, such as health and

life satisfaction. As such, it may be able to add theoretical sophistication to an otherwise "theory weak" literature.

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Notes

1. Ritzer (1983) identifies a minimum of six schools of neo-Marxian thought with “irreconcilable differences among them.”
2. It is interesting to note that Giddens (1975) uses many of these same criteria as the foundation for the emergence of class consciousness among the proletariat.
3. Ironically, forecasters are already projecting that the repeal of the *Medicare Catastrophic Coverage Act of 1988* will affect the more affluent elderly. The premiums for private health insurance will soon skyrocket. It is likely that the projected surcharge for the government insurance would have been less expensive than the increase of private insurance premiums (Kosterlitz, 1989).
4. The 1967 *Age Discrimination in Employment Act* prohibited job discrimination of employees between the ages 40 to 65. Workers over the age of 65 were not covered. It was this legislation that forced Maggie Kuhn to retire. In 1978, the *Act* was amended to include protection for those 70 and younger. The Gray Panthers successfully lobbied for the passage of the amendment. The 1986 amendment protected employees from forced retirement at any age.