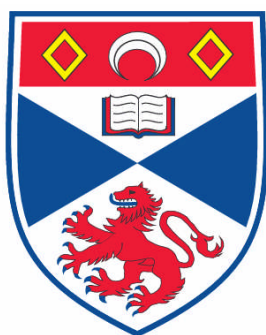


**OLDER PEOPLE IN SCOTLAND : THE FAMILY, WORK AND
RETIREMENT AND THE WELFARE STATE FROM 1845-1999**

Elizabeth Leslie Black

**A Thesis Submitted for the Degree of PhD
at the
University of St. Andrews**



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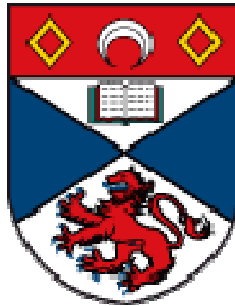
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OLDER PEOPLE IN SCOTLAND:

**THE FAMILY, WORK AND RETIREMENT
AND THE WELFARE STATE FROM 1845-1999**



A thesis presented for the degree of

Doctor of Philosophy

to the

University of St Andrews

Submitted 31 January 2008

by

Elizabeth Leslie Black

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DECLARATION

- (i) I, Elizabeth L. Black, hereby certify that this thesis, which is approximately 100,000 words in length, has been written by me, that it is the work carried out by me and that it has not been submitted in any previous application for a higher degree.

Date 31 January 2008

Signature of Candidate

- (ii) I was admitted as a taught M.Litt student in September 2001, and subsequently as a candidate for the degree of Ph.D in September 2002; the higher study for which this is a record was carried out in the University of St Andrews between 2002 and 2007.

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- (iii) I hereby certify that the candidate has fulfilled the conditions of the Resolution and Regulations appropriate for the degree of Ph.D in the University of St Andrews and that the candidate is qualified to submit this thesis in application for that degree.

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Working with my topic on the social history of older people in Scotland has been a wonderfully satisfying experience. The challenge of incorporating a new area of study into the field of Scottish History has its inherent problems and hidden treasure troves. In the main, it is the treasures that have kept me on task. I have been very fortunate to have the support of the School of History in this project. Specific staff members, past and present, who have most kindly listened and offered suggestions include Professor T.C. Smout, Professor Keith Brown, Professor Rab Houston, Dr Steve Murdoch, Dr Tim Minchin, Mr Chris Schmitz and Mr Alex Woolf. I am grateful for the kindnesses and helpfulness I have enjoyed at many libraries and archives throughout Scotland, on which regard I wish to thank the University of St Andrews Main Library, Departmental Library and Special Collections Department, the Dundee Central Library, the Edinburgh City Library, the National Archives, and the National Library of Scotland. My special thanks are due to the Edinburgh Age Concern Library, the Scottish Brewery Archive at the University of Glasgow, and the Dundee University Archive. I would like to warmly thank every individual (of whom there were many) who helped me with my oral history project in Edinburgh and Dundee, in particular the managers of the Dundee and Broughty Ferry Age Concern Day Centres as well as Catherine Mein, a vital source in Edinburgh whose association with the Napier Club led me to dozens of oral history contacts. No matter how efficient modern technology is, it was hardworking and caring people such as these who found the time to help. Words of thanks are not enough for my supervisor, Dr William W.J. Knox, who has provided me with that moment of grace every researcher craves: a true working partnership in which I was as much colleague as I was student. I cherish the opportunities I had to collaborate with such fine people.

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In memory of Robert Bruce Black
my beloved father
19 September 1931 - 3 January 2006

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ABBREVIATIONS

ACE	Age Concern England
ACLE	Age Concern Library, Edinburgh
ACS	Age Concern Scotland
BPP	British Parliamentary Papers
COS	Charity Organisation Society
CS	Church of Scotland
DCL	Dundee Central Library
DHSS	Department of Health and Social Security
DWP	Department of Work and Pensions
ECL	Edinburgh City Library
ESRC	Economic and Social Research Council
GHS	General Household Survey
GRO	General Registry Office
HA	Help the Aged
LA	Local Authority
MP	Member of Parliament
NA	National Assistance
NAS	National Archive of Scotland
NI	National Insurance
NLS	National Library of Scotland
OAP	Old Age Pensioner
OPCS	Office of Population Censuses and Surveys
PRO	Public Record Office
SE	Scottish Executive
SLA	Scottish Local Authority
STUC	Scottish Trade Union Congress
UDA	University of Dundee Archive
UGBA	University of Glasgow Brewery Archive
USASC	University of St Andrews Special Collections
U3A	University of the Third Age

ABSTRACT

The social and economic experiences of older people in Scotland over the past two centuries provides a particularised lens through which larger themes of change and adaptation may be analysed. Older age cohorts are examined as specific identity groups within the context of a society in rapid transformation. The years c. 1845-1999 represent a period of time in which almost every sector was affected by industrialisation, urbanisation, migration, economic developments, technological and medical progress, and social reform. In combination with historical interpretations, modern sociological theory concerning the aged as a distinct social grouping provides the basis for further inquiry. Concepts such as status, social capital, interdependency, paternalism and citizenship have been of major importance in structuring this research. By means of demographic analysis, readings of written biographical documentation, and the incorporation of over fifty oral histories conducted in Dundee and Edinburgh, the role of the family in older people's lives has been explored. Nineteenth and twentieth-century population trends have been incorporated as an area for detailed investigation of long-term familial practices. An understanding of the older person's role in the family over time suggests a formalised socio-economic stability based upon kinship ties, gender roles, and economic and social reciprocity. Stage theory allows for examination of the economics of ageing, particularly in regard to employed and retired older people. Original research covering older people's experiences of work in Dundee and Edinburgh provides qualitative and quantitative data on paternalistic policies in the brewing and jute industries, promotion and retirement practices, and economic status among the working elderly. The experience of being retired has been evaluated in terms of economic independence, social capital, class and gender. Analyses of the experience of retirement in the post-war era are bound with the rise of the modern welfare state. Significant government commissions and acts provide scope and sequence in an analysis of the role of the state in old age. Principally, the New Poor Law of 1845 (Scotland), the Pension Acts of 1908 and 1925, the National Insurance Act of 1946, as well as the social welfare acts of 1948 have been studied. Particular focus on the influence of the Social Work Act 1968 (Scotland) complements an overarching argument concerning Scotland's unique practices in the modern welfare state. Emphasis is on care in the community, using statutory and voluntary services provided at the local level as case studies. Interpretations of older people in terms of their various roles in the welfare state, their communities and places of work, and within their families indicates that throughout the period, older populations have distinctively adapted to the long-term effects of modernisation in Scottish society.

INTRODUCTION

Recent attention to the subject of old age in modern Scottish society is an indication that there yet remains a gap of knowledge between practitioners and politicians. In light of specific policies which have been introduced by the devolved Scottish Executive over the past few years, older people are at present on the political map. Although this has been deemed a good thing by the electorate, the underlying issues of ageing and the historical question of older people's experiences in Scotland have been excluded from the political process. For the short term, this was problematic because many of the same mistakes have been made in the provision of social welfare services. For instance, much of what is known among care providers has not had a direct impact on policy. This has partly resulted from the dearth of scholarship in schools of history and the social sciences in Scotland. While there is an extraordinarily large body of gerontological literature as well as sociological and historical studies of old age in England, work on ageing in Scotland has been concentrated in the field of medicine. Hence, the social and economic experiences of growing older in Scottish society have been intermittently approached in relative isolation. In an attempt to address this historical deficit, the broad subject of the socio-economic history of older people in Scotland was selected as the topic for this thesis. Various significant areas of discourse, including an historical examination of Scottish older people's roles in their families, workplace, and communities, will provide the foundation for specific analyses of the modern welfare state and its treatment of this age group.

Two areas of inquiry determined the research agenda and subsequent interpretations of the social and economic experiences of older people in Scotland in the late modern period. Both questions were chosen on the basis of their ubiquity in recent social discourse. The first of these has provided the foundation for political debate over

the past one hundred fifty years: Whose responsibility is it to provide for old age? Viewed historically, the manner in which the individual, family, community, and government have attempted to resolve this question reveals several dominant ideological processes. Traditional paternalistic societies in Scotland functioned on the basis of reciprocity. Social and economic arrangements between individuals were based on Calvinist concepts such as social responsibility and self-help. Modernising trends in the nineteenth century such as mass migration and urbanisation challenged paternalistic models of social control. Moreover, widespread poverty and social inequality made greater demands on the individual and the family, revealing the inadequacies of a *laissez-faire* government. The specific issue of poverty in old age was addressed in social reform movements, in which both individual and collective responsibility were debated. Government intervention and formalisation of statutory benefits and local government services for older citizens in the modern welfare state can be viewed as a progressive stage in this process. The continued debate about the *locus* of responsibility tends to ignore the larger problem of unequal access to social and economic resources over the life course. Therefore, an important methodological tool in interpreting the original question has been the use of the concept of capital. The exchange and distribution of capital function as the basis of examining the historical processes of ageing populations in terms of society and the individual.

The second underlying question is more fundamental: what is old? Aside from individual transitions based on biological processes, old can be understood as a component of the social phenomenon of ageing. Old age is thus a process as well as a specific stage of human development. Both have been used to construct the basis of an identity group. The centrality of identity as the basis for discussion of the social experience of old age is part of a larger project in recent scholarship. Identity in terms of age, class, gender or cultural practices (to name a few) has been an important tool in

revisionist histories of population groups typically absent from the grand narrative. Many of these will be referred to because of the overlap of these respective identities in Scottish history. Understandings of old age as an identity have been more specifically addressed in the social sciences. Interpretations of social roles and practices in society importantly address the micro and macro experience of being an older person on the basis of his/her identity. However, unlike other forms of identity, old age is at least a potential for everyone. Thus being older can be equated with a unique social status in the life course. As a complement to specific analyses of identity, the concept of status will underpin the historical analysis of older people's social standing in various economic and social environments.

Much of what is known about older people's status in the earlier part of the period is based upon external perceptions of the elderly as a social group. Views expressed by means of publications in the public domain as well as those in private collections concerning the aged poor, for instance, have proven to be contradictory and prone to shifting social and political agendas. Unfortunately, such 'objective' views of old age tended to emphasise that older people formed a separate 'other' class of their own, and failed to articulate the authentic experiences of ageing. Polarised impressions of what it meant to be old resulted in ambiguous definitions of the onset of old age. Contemporary definitions of the division between middle age and old age indicated a diverse understanding of ageing as a process. Although the physical onset of old age and death typically took place comparatively much earlier in an individual's lifespan in the nineteenth century, there was a politically motivated tendency to define old age in the most stringent of functionalist terms¹. For quite different reasons, modern definitions of

¹ Poor relief under the 1845 New Poor Law (Scotland) was given to older widows unable to work, and men worn out by work, both criterion were fairly vague in nature and practice. Indeed, the minimum age of seventy in the Old Age Pensions Act (1908) was the result of political expediency; both Houses of Parliament would not commit the Treasury to a universal pension for individuals less than seventy years of age.

old age also tend to be elastic. The question of identity as an older person on the basis of the individual and the collective must therefore be explored in terms of historical trends and social mores.

An historical examination of older people and their families provides an important personal perspective of ageing and of being an older person. The various roles, duties, and relationships within and between families over the past two centuries indicate the importance of inter-generational kith and kin networks for older people. Such kinship systems were a unique feature of Scottish cultural practices: loosely based on the clan system, families developed kinship networks in the modern period. The long-term effect of mass migration to urban areas in the nineteenth century raises questions as to how families adapted to these processes. The specific strategies families employed to maintain social cohesion must be interpreted, and older people's roles and responsibilities must be explored within these structures. Interpretations of status and capital underpin specific arrangements in the family such as the significance of the head of household, gender relations, the allocation of informal care provision, and the pooling of economic resources. The significance of these informal ties as a mechanism in the provision of care for older family members must be further queried in respect to individual's experiences in old age during the twentieth century. As an increasing number of people lived longer, family roles had to adapt in line with social trends. These changes will be addressed in analyses of family networks as well as the examination of special family relationships including that of the grandparent; more intimate relationships such as marriage and companionship in old age will be similarly assessed. The stabilising force of the Scottish family can be understood to be an adaptation to demographic and economic change over time.

The shift from relatively full employment in old age in nineteenth-century industrial Scotland to mandatory retirement in twentieth-century post-industrial Britain

provides a diverse range of experiences for an analysis of work patterns in old age. Firstly, older people's roles as producers and their participation in the workforce in the nineteenth and early twentieth century must be explored. Older employees' practices and their employers' policies provide specific understandings of how labour relations and market trends in the nineteenth century determined these experiences. Because the individual's capacity for work in particular industries and services was inherently prone to economic cycles, specific trends in Scottish industries provide a backdrop to these circumstances. It can be argued that older workers, employed out of financial necessity in the nineteenth century, functioned as a surplus labour force in the twentieth century. Secondly, the consequences of enforced redundancies due to cyclical periods of economic depression and the introduction of a set retirement age in the twentieth century raises important issues. For instance, the socio-economic impact of exit from the labour force upon older people must be assessed. And lastly, the experience of retirement in the twentieth century must be addressed as an historical process. Understandings of how retirement practices in the nineteenth century were established provides an indication of why older people undertook specific cultural practices as retired people in the twentieth century. The relationship between a lifetime of work, as well as the temporary or permanent lack of it, with social standing² and economic independence in old age will be determined.

The rise of the welfare state in Great Britain has proven to be contradictory in terms of the adoption of social policies for older people. The underlying problem of poverty and inequality in old age provides scope for inquiry concerning the source of responsibility for the provision of welfare. An examination of voluntary methods of providing poor relief and care in nineteenth-century Scotland suggests that analyses of

² As employment dictates social class while an individual is in work, as a producer, social standing in old age is dependent on the accumulation of capital over a life career, thus determining the capacity to consume. Social standing should be understood as the status which accompanies the economic position an older person holds in retirement.

the poor law must also include Scottish methodologies. Likewise, the historical processes which ultimately led to non-contributory Old Age Pension legislation in 1908 must be assessed in terms of the implications of statutory pension policies upon Scotland's autonomy in these matters. Debates about the rights of citizenship and the introduction of *British* welfare state policies in the post-war period indicate that divisions between Westminster and Scotland were far from being resolved. It can be argued that while government was an unwilling partner in the welfare state, Scotland was increasingly conscious of a loosening grip on her own affairs. These interpretations can be applied to critiques of significant pieces of old-age legislation passed in 1946 and 1968: the National Insurance Act (1946)³ and the Social Work (Scotland) Act, 1968. An assessment of the management and infrastructure of the modern welfare state reveals specific problem areas such as the inadequate provision of old-age pensions for women and a post-code lottery of housing and social services. A source of social welfare for older people in the post-war period, the voluntary sector in Scotland provides a vehicle for exploring the themes of self-help. Moreover, the role of such institutions as a bridge between the welfare state and the individual raises specific questions concerning the rights and obligations of citizenship throughout the life course.

The content and challenges of old age have been the subject of a progression of theoretical models and social discourse in the post-war period. Theoretical development in the social sciences dealt with various aspects of social norms and practices in respect to specific population groups. Various models incorporated the dualism of the collective and individual experience. In the 1960s, functionalist theory approached interaction between social groups and the self on the basis of collectivities of roles that complemented each other in fulfilling functions for society. The key processes in

³ The National Insurance Act of 1946 was one application of William Beveridge's proposals to conquer post-war want in the form of contributory state pensions, unemployment insurance, a national health service, a national system of education, and national assistance.

attaining equilibrium were socialisation and social control.⁴ Functionalism thus addressed class and gender relations in terms of social reproduction. Further interpretations of social order and power relations were developed in stratification theories. The distribution of power in the community was addressed on the basis of the individual's ability to control various social resources and their social status in hierarchical systems of domination and subordination.⁵ The social position of individuals determined their life chances. An emergence of individuated analyses of the social experience was a manifestation of the role of the individual in the social dialectic. Postmodern debates originating in these theoretical models were reinterpreted in the field of social gerontology. Theoretical concepts such as the status of older people in post-industrial Western society sparked decades of debate in gerontological literature. Revised interpretations of Marxian class reproduction and stratification theories underpinned arguments concerning differentiation between older people and respective age cohorts. The latter were significant predecessors to life course, structured dependency, political economy, and inequality theories developed in the field of gerontology in the 1980s. The incorporation of the wide range of thought over the past forty years provides a foundation for current debate as well as an historical understanding of the contemporary *milieux* to which these theories relate.

The social status of older people was examined on the basis of the distribution of wealth and the nature of power within society over a lifetime. It is in the context of an individual's life span that French sociologists Pierre Bourdieu and Anne-Marie Guillemard argued that class and social capital⁶ determine the structural dynamics of old age, as well as that of the next generation. Guillemard analyses social relations, *viz.* social capital, as a cultural context over time, as well as how such social relations determine the

⁴ T. Parsons, *Theories of Society: Foundations of Modern Sociological Theory* (1961), p. 38.

⁵ M. Weber, *The Theory of Social and Economic Organisation* (1964).

⁶ In this sense, social capital can be understood to be the accumulation of kinship networks.

content of old age. She maintained that the reproduction of social and class relations at every age strata influences social status in old age.⁷ Bourdieu qualified his own understanding of social reproduction with his theoretical conception of fixed potentialities: 'Outlooks on the future depend closely on the objective potentialities which are defined for each individual by his or her social status and material conditions of existence. The most individual project is never anything other than an aspect of subjective expectations that are attached to an agent's class'.⁸ The individual's experience of class thus limits the older person's potential activities as a consumer and as a participant in the community. Social and economic potentials are further reduced by the onset of retirement. Guillemard contended: 'Retirement and old age [are] expressions of the terminal point in the general process of the reproduction of social relations'.⁹ It can be argued that retirement and old age are a magnification of the process of reproduction of social relations, relative to objective *and* subjective forces.

The theoretical interplay between the objective determinant of class structure and the subjective component of the family reflects a synthesis of thought, rather than a purely structural model. The examination of the effect of family practices suggests why the experience of old age is not homogeneous within a particular class, thus allowing for individual input in addition to class structure. Although dependent on the state of power relations between the classes, the family itself plays a tremendous part in the reproduction of status and social capital. Bourdieu made a case for the family as the *locus* of social reproduction:

Reproduction strategies, the set of outwardly very different practices whereby individuals or families tend, unconsciously and consciously, to maintain or

⁷ A. Guillemard, "Old Age, Retirement, and the Social Class Structure: Toward an Analysis of the Structural Dynamics of the latter Stage of Life", in, T. Haraven and K. Adams (eds) *Aging and Life Course Transitions: An Interdisciplinary Perspective*, (1982) p.225.

⁸ P. Bourdieu, *Algeria 1960* (1979), p. 53.

⁹ Guillemard, "Old Age", p.223.

increase their assets and consequently to maintain or improve their position in the class structure, constitute a system which, being the product of a single unifying, generative principle, tends to function in a systematic way.¹⁰

Bourdieu's application of reproduction strategies, as individual and familial practices in the interest of maintaining assets and position, provides a foundational construct of social capital and kinship networks in old age. It is important to consider the unique context of the family unit over time, because the family influences the potentialities and limits of social capital, and it operates as the predominant source of care and support for its older members. Hence, an individual's subjective experiences as a family member within an objective context of social class, over a lifetime, affect the socio-economic experience of being an older person.

The heterogeneity of ageing indicates that the analysis of old age from an entirely objective perspective is inadequate. Gerontological study over the past two decades reflects this view: theories about old age developed by Tamara Haraven, Kathleen Adams, Sara Arber, and Maria Evandrou are structured in the wider context of the life course. Life course theory links progressive life transitions with biographical experience by addressing the interaction between individuals, family, and historical time.¹¹ The latter concept of historical time is arguably the most relevant as to the question of how the socio-economic experience of ageing has changed over time. Haraven and Adams explain: 'An age cohort moves through history, [and] their social experiences [are] influenced by both contemporary conditions and experiences of earlier life course transitions'.¹² Therefore, an understanding of the entire life process as a continuum must be situated in its historical context. Building upon these historical arguments in terms of family relations and transitions, Arber and Evandrou apply a conceptual framework of

¹⁰ P. Bourdieu, *Distinction: A Social Critique of the Judgment of Taste* (1984) p. 125.

¹¹ T. Haraven, "The Life Course and Aging in Historical Perspective", in *Aging and Life Course Transitions: An Interdisciplinary Perspective*, T. Haraven and K. Adams (eds) (1982), p.5

¹² Haraven, "The Life Course", p.8.

life course theory based on status. The valuation attached to occupancy of different social roles at different times is the basis for their analysis of three major transitions undertaken by the older citizen: the transitions in family roles, transition from paid work, and the transition in health and caring needs.¹³ Importantly, in terms of the variable experiences of such transitioning, they distinguish between the genders and classes in their analyses of changing statuses. Hence the status of being old is understood as a culmination of the patterns of an individual's life course in its entirety.

The integration of the older individual in the community provided scope for further explanations of macro social processes. For example, power relations in the workplace and the infrastructure of the modern welfare state have been incorporated in various analyses of the politics of public policy. It has been argued that ageism coupled with the rationing of services and the administration of pensions has had a detrimental impact on older people. The relationship between the British Welfare State and the older individual became the basis for a critique of current practices and policies. Sociologist Peter Townsend's structured dependency¹⁴ theory, which concentrated on the institutions of the welfare state, was complemented by social gerontologists Alan Walker's and Chris Phillipson's political economy theory. In the latter model, Walker and Phillipson emphasised the fundamental role of social policies which shaped the lives of older people, and thus generated many of the characteristics associated with old age. To paraphrase Phillipson and Walker, there was a relationship between ageing and economic life: the differential experience of ageing is according to social class *and* the role that social policy plays in producing the dependent status of elderly people.¹⁵ The political economy perspective is further deepened by Walker's basic premise that the social

¹³ S. Arber and M. Evandrou, "Mapping the Territory: Ageing, Independence and the Life Course", in *Ageing, Independence and the Life Course*, S. Arber and M. Evandrou (eds) pp. 12-15

¹⁴ P. Townsend, "Ageism and Social Policy" in *Ageing and Social Policy: A Critical Assessment*, C. Phillipson and A. Walker (eds) (1986) p. 15.

¹⁵ C. Phillipson and A. Walker, 'Introduction', in *Ageing and Social Policy: A Critical Assessment* (1986) pp.1-8.

construction of old age is a function of two sets of relations. Firstly, he argued that older people carry into retirement inequalities generated and reinforced at earlier phases of the life cycle, for instance, by means of the labour market; and, secondly, the processes of retirement impose a diminished social and economic status onto a large proportion of older people in comparison with younger economically active adults.¹⁶ Political economy theory underscored R.M. Titmuss' earlier conclusion that retirement and old-age policies perpetuated "two nations"¹⁷ in old age, evidenced by inequalities in pension provision for women and the working class.

The problem of inequality in old age has been analysed in a qualitative sense, such as on the basis of the link between the individual self and social networks. Social and economic inequalities in old age were understood to be a culmination of an individual's experiences over time. Sociologist John Vincent suggested that: "The various processes of differentiation- the division of labour, socialisation of various kinds and ideological control of the dissemination of ideas- apply to old age."¹⁸ The imbalance of power in old age underpins Vincent's inequality theory, a synthesis of life course, social reproduction, structuralism, and dependency theories. The distillation of thoughts associated with these theoretical models lends itself to Vincent's specific application of differential group structures and exploitation within and between age cohorts over a lifetime. His amalgamation of over two decades of development in the area of social gerontology is instructive. Vincent's inequality theory concerning the issues older people face as a minority group brings much-needed attention to the problems of aloneness, unequal class status, family composition, and employment patterns, as well as ageist social policies; all of which, Vincent argues, are indices of differentiation in the life cycle. Illustrating the worst extremes of inequality, he specifically addressed the nature of

¹⁶ A. Walker, "The Politics of Ageing in Britain", in *Dependency and Interdependency in Old Age: Theoretical Perspectives and Policy Alternatives*, C. Phillipson, M. Bernard and P. Strang (eds) (1986) pp 37-38.

¹⁷ R. Titmuss, *Essays on the Welfare State*, (1958) p.74.

¹⁸ J.A. Vincent, *Inequality and Old Age*. (1993), p. 179.

isolation and social exclusion experienced by a substantial minority of older people. Inequality theory therefore raised important questions about the persistence of social and economic poverty in old age.

Although many sources have stressed the ageing of British society in terms of a problem, the body of secondary literature in history and the social sciences provides a more complete understanding of the social experiences of older people in the late modern period. Using an interdisciplinary approach, a broad selection of foundational texts were used to research the general theme of old age as well as the historical context in which older people conducted their everyday lives. In the area of old age, sociological and gerontological studies provided a basis of understanding of current debates on questions of identity, gender and class relations, social and economic processes, such as informal care, employment, and retirement, and also examinations of formal policies. Many articles covering these topics have been published in the periodical *Ageing and Society* in the last twenty-five years; the entire volume of these articles was reviewed in the interest of achieving familiarity with the subject matter. A number of contributors to *Ageing and Society* were consulted, of which a few were used as important sources in the thesis. Sociological studies of older people and their families conducted by Peter Townsend provided essential insights into these experiences, which have hitherto not been addressed in Scotland. Clare Wenger's work in Wales provided a broad understanding of informal care networks and resources, which has been essential for making comparisons between the urban and rural experience in Scotland. In the area of social gerontology, Chris Phillipson and Alan Walker's research has contributed to a general knowledge of social policy and the welfare state. As an important bridge between the social sciences and history, Pat Thane's *Old Age in English History* (2000) was consulted and used in various sections of this thesis as the basis for debate and further contextualisation of older people's experiences in England. British and Scottish historical

sources covering a range of themes in social and economic history provide the backdrop for the examination of the social history of old age. W.W. Knox's *Industrial Nation* (1999) and Tom Devine's *The Scottish Nation* (1999) provided valuable insights into Scotland's economic and political history in the late modern period; respectively, Eleanor Gordon's work on Scottish women's history and R.J. Morris's examinations of the urban experience in Scotland were essential. In addition to extensive reading of sources from the nineteenth and twentieth centuries in at least four separate disciplines, the works mentioned here established the research agenda and selection of primary material.

Given the relative lack of Scottish data in past studies of older populations in Great Britain, Royal Commissions, old age pension and welfare state legislation, and the census were consulted with the view of extrapolating material which specifically addressed the Scottish experience. Of these, the most vital were the New Poor Law 1845 (Scotland), the Social Work Act 1968 (Scotland) and the decennial census. The legislation provided evidence of the distinctive methods by which Scottish society has provided poor relief and formal care for older people. Similarly, the census, as well as census enumerators' reports, provided demographic material which allowed for an urban comparison as well as specific studies of marriage patterns, gender differentials, and work histories in Scotland. However, the census proved to be problematic in several areas. Firstly, over time, specific data such as ages of the population became less informative; arranged by quinquennial periods in the nineteenth century, by 1931 population data was bracketed together inconsistently in subsequent reports. This limited longitudinal comparisons in early exit practices, retirement, and marriage patterns in the twentieth century. Secondly, there were instances when it was clear that miscalculations were reported. In the 1851 census, married women were underrepresented in the employment data. In the 1931 census, total unemployment was grossly underreported; for instance, it

reported that 92% of men aged 55-60 were fully employed in Scotland.¹⁹ Because unemployment rates were so high during the Slump, this data is quite misleading. Lastly, because census enumerator's reports are restricted for a 100-year period, twentieth-century material was not available. The latter reports were useful in terms of supplementing the nineteenth-century census, for the most part by providing a clearer picture of housing arrangements, occupations of the inhabitants, and the precise ages of the people in specific areas in Scotland. Controlled samples were taken from the Dundee and Edinburgh enumerators reports (1851 and 1901). The review of formal and quantitative data raised specific questions concerning the implications of statutory policies and demographic change in terms of older people themselves.

Because Scottish people were prolific biographers in the nineteenth century, numerous reminiscences and other biographical material provided specific historical themes as well as personal accounts. The selection of these was deliberate: because a majority of published material tended to be written about middle-class men, most of these were not consulted. In an attempt to gain a more balanced perspective in terms of class and gender, a larger proportion of women's biographies and working-class accounts were read. Among these books, many were ultimately excluded from the bibliography because the authors failed to address their experiences in old age. Furthermore, narratives incorporating Dundee or Edinburgh as a backdrop were prioritised. Some of the most useful sources were the Dundonian ones. A reflection of their own interest in conserving the city's history, the Dundee Central library has one of the largest collections of local nineteenth century working-class biographies in Scotland. These narratives were an important complement to the examination of the jute industry, the history of local businesses, family history, the predominant role of women, and of course the experiences

¹⁹ BPP, *Census of Scotland, 1931* (1933).

of older people in the late modern period. Biographical material describing the experience of work in particular set a specific research agenda in terms of the employment and everyday life of older people in this period.

In order to examine national experiences and trends with smaller and localised conditions Dundee and Edinburgh were selected as case studies. The rationale behind this choice lay in the fact that; firstly, Glasgow has been comparatively over-researched in Scottish social history and there limited gains to be made in historical knowledge; and, secondly, the socio-economic history of Dundee provides an excellent contrast to that of Edinburgh. In the nineteenth century, the socio-economic composition of Edinburgh, a middle-class city, with a mainly service-based economy but with some industrial development, contrasted sharply with Dundee, a markedly working-class town mainly dependent on one industry. As the dominant employer in Dundee for over one hundred years the jute industry and its impact on the city's older population was examined through records held at the University of Dundee Archive. In contrast to Dundee, there was not one principal employer in Edinburgh. Although the service industry was fairly dominant, it was viewed to be appropriate to select an industry that was more closely aligned to manufacture and production. Therefore, the brewing industry as a provider of work for older people was selected as a case study. Records of the brewing industry are currently held at the University of Glasgow. Because the brewing industry was paternalistic in nature, private correspondence and company minutes provided a rich source of material for an insightful study into labour relations and older workers' status in the workplace.

A significant methodological challenge was that the jute industry failed to record specific information concerning their female workers. It was thus never clear how many women worked in jute, how much they earned in wages over a set period of time, and seldom were the ages of employees documented. Sources such as accident reports,

photographs, and the occasional private correspondence thus only provide a small understanding of older women's experiences in jute. Hence biographies and oral histories were useful to establish a clearer picture of the experience of work, norms in the workplace, and older people's roles in the community.

The use of oral history as a methodology originated as a means to address the specific historiographical gap in the social history of older people in late modern Scotland. As one of several excluded population groups in Scottish history, the limited range of historical narratives concerning older people in Scottish society were complemented by the debates regarding the exclusion of working-class and women's histories. Thus, the use of oral history has been a form of furthering our understanding of the history from below project, which had its origins in the social sciences in Britain. In the late 1950s, the eminent sociologist Peter Townsend interviewed 203 families in Bethnal Green, London, and used these case studies in *The Family Life of Old People* (1957), a milestone in old age literature. Townsend sympathetically incorporated original testimonies, thus providing older people with a forum in which to articulate their feelings, concerns, and memories.²⁰ The historical interpretations of Bethnal Green's working-class community have subsequently influenced numerous academic studies in various disciplines.²¹ With the publication of E.P. Thompson's seminal work *The Making of the English Working Class* in 1963, the inclusion of working-class histories functioned as a means of examining historical events 'from below'. Operating as a corrective, 'history from below'²² ideology has shaped historical narratives for more than three decades.

²⁰ P. Townsend, *The Family Life of Old People*, (1957).

²¹ Including: M. Young and P. Wilmott, *Family and Kinship in East London*, (1957); I.M. Richardson, *Age and Need*, (1964); J. Burnett (ed.), *Useful Toil: Autobiographies of Working People From the 1820s to the 1920s*, (1974); P. Thompson, *The Voice of the Past: Oral History* (1978); J.M. Jackson, (ed.) *The City of Dundee: The Third Statistical Account of Scotland*, (1979); and P. Thane, *Old Age in English History*, (2000).

²² With the publication of E.P. Thompson's seminal work - *The Making of the English Working Class* - in 1963, the inclusion of working-class histories functioned as a means of examining historical events 'from below'. Pioneers of the 'history from below' approach took the viewpoint of the exploited and oppressed. Thompson's imperative was to give voice to individuals and groups typically silenced in British historiography.

Historians such as Sheila Rowbotham, R.Q. Gray, and James Hunter wrote histories in the 1970s from the point of view of women, labouring classes, and crofters, until that time excluded from grand narratives. The inclusion of these voices into Scottish historiography highlights the battle for the control of voices, texts, and memory, which form the substance of the rendering of the past.²³ More recently, oral history projects have been undertaken in urban areas in Scotland in the interest of preserving individual and group histories. Some of the most notable of these have been Jean Faley's *Up Oor Close* (1990), Helen Clark and Elizabeth Carnegie's *She Was Aye Workin'* (2003), and the Dundee City Council's *Learning Through Reminiscence* (2002). All three works provide personal narratives of tenement women in Glasgow, Edinburgh, and Dundee. A vital complement to the use of archival material and secondary sources in several disciplines, oral history allows hitherto excluded sources to speak for themselves. By targeting population groups on the basis of gender, class, or ethnicity, oral historians have shown an increasing concern with the social dimension in historical analysis. The inherent value of incorporating oral history methodologies into a project such as this has proven to be immeasurable.

Examining older people as an identity group, it was almost immediately recognised that their voices were underrepresented. Although there is little that can be done to ameliorate the dearth of historical material prior to the twentieth century, the deficit can be to some extent be addressed by interviewing a wide section of older people in Scotland. In the summer of 2004, over fifty formal and fifty informal interviews were conducted with older people in Dundee and Edinburgh, including men and women from a variety of socio-economic backgrounds in order to generate a fairly representative sample of older Scottish respondents. Therefore, specific geographic areas were targeted.

²³ L. Gourievidis, "Representing the Disputed Past of Northern Scotland", *History and Memory: Studies in Representation of the Past*, **12** (2), p. 6.

The Hilltown in Dundee and Drylaw Parish in Edinburgh, two of the most deprived urban areas in Scotland, were offset by Broughty Ferry and Morningside, two wealthy communities in Dundee and Edinburgh, respectively. The selection process of interview subjects entailed a controlled sampling of senior day centres, lunch clubs, sheltered accommodation, and private residences in both cities. Although the average age of the participants in these venues was around eighty, the inquiry included the entire age range, individuals from the ages of sixty to one hundred and two were interviewed. Operating as the basis of my case studies in the post-war period, eighty-four women and sixteen men were asked three primary questions about old age. Firstly, what is old age; secondly, when did the individual begin to feel old; and, lastly, what significant life events over the life course have shaped their lives in the present? Candid responses about identity, the family, work histories, health, and the ageing process dominated the discussions. Recollections of historical events such as the Second World War provided a unique context for the age cohort born between 1919 and 1930. Taken as a whole, the original material revealed several bases for analysis of the social experience about being an older person in Scotland in the modern period. The synthesis of oral and written accounts served as a vehicle to speak for those who had been rendered voiceless in Scottish historiography.

The historical experience of being an older person in nineteenth and twentieth-century Scotland shall be argued thematically in terms of identity, family networks, employment, retirement and the welfare state. Although the chapters are organised chronologically within their respective themes, each half of the thesis represents two distinct understandings of old age. Interpretations of these larger questions will precede the two sections. The first two chapters represent the micro perspective of older people, addressing social ageing in term of the individual. The second two chapters respectively represent the macro perspective, exploring various public roles in the community and

state. Specifically, chapters 1 and 2 will focus on the identity of old age and the social and economic dynamics of older people's relationships with their families, shaped by the patterns resulting from demographic change over time. Chapter 3 will examine the nature of work in old age and the shift from full participation in the workplace to retirement, with particular emphasis on the lower middle-class and working-class experience. Chapter 4 will evaluate the state's pension policies and statutory services on the basis of contradictory ideologies concerning citizenship and self-help. Specific reference will be made to Social Work and the Scottish voluntary sector as providers of social services and welfare. Analyses in the conclusion will provide the basis for further areas of research into the history of older people in Scotland in the late modern period.

OLDER PEOPLE AND THEIR FAMILIES INTERPRETATIONS

The family has for many centuries played a pre-eminent role in the lives of Scottish older people. Throughout Highland and Lowland Scotland, families have been a vital source of stability for kith and kin. Whether as fictive kin¹ or blood relations, family members maintained affective ties and implemented elaborate economic arrangements among themselves. Until 1946, the extended family was expected to play an almost exclusive part in managing for the welfare of its oldest family members, thereby functioning as a relatively autonomous kinship network. It is significant that the practice of familial interdependence² is repeatedly referred to in nineteenth and twentieth-century accounts and official documents, as well as in modern historical analyses. Moreover, Scottish social historians³ have examined broader themes of family relationships, such as Highland clanship and noble society in the early modern period, kinship and patronage relationships in the seventeenth century, eighteenth and nineteenth-century testamentary customs, social networks amongst working-class women in late modern urban environments, and the nascent history of childhood in Scotland. However, the history of *older people* and their families has been for the most part overlooked⁴. Consequently, numerous questions concerning the qualitative and quantitative experiences of older people in nineteenth and twentieth-century Scotland remain to be explored. Perhaps the

¹ Marvin Sussman describes fictive kin as 'adopted members who take on obligations and instrumental and affectional ties similar to those of conventional kin'. Referred to in H. Rae, "Fictive Kin as a Component of the Social Networks of Older People". <<http://poverty.worldbank.org>> 25 August, 2004.

² Albeit not named as such in the primary sources. The principle of interdependence can be defined as a distinction between independence and dependence, in that various forms of care are exchanged freely between generations, thus providing independence based on mutual dependence.

³ A. Cathcart, monograph on clanship in the central and eastern Highlands, 1451-1609 (2006); K.M. Brown, *A Noble Society: Wealth, Family, and Culture From Reformation to Revolution* (2000); S. Murdoch, *Network North* (2005); R.J. Morris, various articles and papers concerning economic arrangements in the nineteenth-century family; Glasgow Women's Group, *Uncharted Lives*, (1983); E. Breitenbach and E. Gordon, *The World is Ill-Divided* (1990) and E. Gordon and G. Nair, *Public Lives : Women, Family and Society in Victorian Britain* (2003); and L. Abrams's revisionist histories of the Scottish family.

⁴ P. Thane's *Old Age in English History* (2000) is an important work in the literature of old age; however, it is limiting in relation to Scottish history insofar that her case studies are almost entirely English.

most important question to ask is: how have the particular roles and socio-economic experiences of older family members in Scotland changed over time? Before 1800, social and economic relationships older people had with their families and their communities were determined almost exclusively by social mores and the allocation of resources. It can be argued that the effects of rapid urbanisation and demographic change in the nineteenth and twentieth centuries similarly determined older people's experiences in their families; the extended family became increasingly *more* important as the nineteenth century progressed.⁵ These social and economic potentials and limits⁶ have become increasingly manifest in a population growing older. Interpretations of older people as an identity group and the context of the social environment underpin analyses of the gendered experience of ageing and the family as a socio-economic resource.

As the oldest members of society and their families, older people in nineteenth and twentieth-century Scotland maintained a unique status based on hierarchical practices⁷ and paternalistic customs. In a family-centred society, older people were generally regarded by relatives in terms of affection and respect, indicative of an ethos of filial piety. How this was generalised to older people outside the family network is less straightforward. Polarised notions of old age predominate in contemporary government reports, journals, church sermons, and in the arts. In this respect, an older person's status can be viewed as a reflection of internalised and externalised definitions of what constitutes old age. Such definitions have proven to be unsatisfactory because objective

⁵ Michael Anderson was one of the first historians to interpret the cohesion of the working-class British family with his argument of an *increase* in kinship networks resulting from the impact of urban-industrial life in the nineteenth century. M. Anderson, *Family Structure in Nineteenth-Century Lancashire* (1971), Introduction.

⁶ The French social anthropologist Pierre Bourdieu ascertained the interplay of objective and subjective influences in his studies amongst specific population groups in Algeria. The theoretical models and terminology resulting from his work are inherently applicable to the elderly as a particular identity group.

⁷ Bourdieu uniquely explores the concept of status as a hierarchical model composed of socio-economic capital *and* symbolic capital. Older people thus possess a certain status based on the accumulation of social and economic capital as well as the symbolic capital equated with being a senior member of society.

perceptions often fail to correspond with the subjective experience of ageing. As a consequence, oppositional dialectic concerning the onset of old age, and indeed its very nature, tends to fragment discourse about old age as an identity. Irrespectively, older people have had a highly-developed consciousness of their place in their communities and their families. As the head of household, the patriarch or matriarch, the spinster aunt, or the grandparent, older people had specific family roles determined by their generation and their relative longevity. Individual experiences of becoming an older person are a reflection of the collective experiences of particular societies. Not surprisingly, demographic and migration patterns dictated the nature of such roles on the grounds of the loss of proximity to extended family members, resulting in a gradual shift away from traditional roles in more urban settings.

Towards the end of the nineteenth century, a majority of Scottish families lived in a town or city. Urbanisation profoundly affected social and living conditions. The wide range of quality of life experienced by older people and their families in the nineteenth and twentieth centuries is most remarkable when comparing the cities of Dundee and Edinburgh⁸. The historical and social processes that produced those urban environments⁹ in particular make them useful as case studies on the grounds of socio-economic diversity as well as their specific character. The distinct socio-economic composition of Edinburgh, an amalgam of middle and working classes, versus Dundee, a

⁸ In his study of urban life in nineteenth-century Scotland, the urban historian Richard Rodger argues that Dundee was the poorest and Edinburgh the wealthiest of the four Scottish cities. His comparisons in terms of housing conditions, health, and mortality rates, can be extrapolated as an argument that the quality of life for older people was bound with that of their family *and* particular neighbourhood. R. Rodger, "Employment, Wages and Poverty in the Scottish Cities, 1840-1914", in R.J. Morris and R. Rodger (eds), *The Victorian City, 1820-1914* (1993).

⁹ I use environment as an equivalent of the term field, which Bourdieu used to describe social space, composed of structural systems of social positions and relations. He defined field thus: 'Field [is] a network, or a configuration, of objective relations between positions objectively defined, in their existence and in the determinations they impose upon their occupants, agents, or institutions, by their present and potential situation...'. L.D. Wacquant, "Towards a Reflexive Sociology: A Workshop With Pierre Bourdieu", *Sociological Theory* vol.7 (1989), p.39.

markedly working-class ‘woman’s’ town¹⁰, determined the social and economic opportunities of their inhabitants. Over time, the differentiation between classes was intensified by a widening economic gap. From the middle of the nineteenth century, the middle classes dwelled in affluent residential areas such as the New Town and Morningside in Edinburgh and Broughty Ferry in Dundee,¹¹ whereas the poorer working classes were concentrated in congested city centres and neglected slum neighbourhoods. Although Dundee was markedly the poorer of the two, the working class and the poor in Dundee and Edinburgh lived in similarly poor conditions. The aged poor¹² suffered most from the lack of affordable housing and poor sanitation. The problems associated with poverty and pauperism were calculably worse in particular urban districts in Scotland, and indeed Britain as a whole. How older people adapted to their communities over a lifetime shaped their attitudes and expectations of their environment in old age.

The most significant socio-economic differential amongst older populations in Scotland has been that of gender. This was influenced by demographic change and various social trends concerning the family in the nineteenth and twentieth centuries. Migration to the central belt of Scotland during the nineteenth and early twentieth centuries significantly affected the composition of both rural and urban areas, often resulting in disproportionate gender ratios. The effect of women outnumbering men is observable in the variability of marital status between men and women. Women were far more likely to remain unmarried, thus determining a particular experience of growing older, contrasting with that of widows with children or widowers. Men who were

¹⁰ The effect of the female-dominated jute industry in Dundee lingered into the latter years of the twentieth century amongst the pensioner population and their families living in or around Dundee.

¹¹ Such divisions remained fairly constant throughout most of the twentieth century, in spite of post-war re-housing schemes. This is *most* evident amongst the elderly populations in Dundee and Edinburgh.

¹² In the nineteenth and early twentieth centuries, poorer older people were labelled the aged poor. Numerous contemporary documents and early gerontological scholarship contain this terminology. This is no longer considered an appropriate nomenclature. However, it is useful in reference to those who lived on the margins of or in absolute poverty in old age, because it emphasises the point that poverty in old age was qualitatively different from poverty at other stages of the life course. See Rowntree for his explanation of poverty at various stages of life. B. S. Rowntree, *Poverty: A Study of Town Life*, 2nd ed. (1902).

widowed before their middle years typically remarried women measurably younger than themselves, creating family units that would provide them with companionship, economic support, and care in old age. Most men were married or only briefly widowed in old age. Because women typically outlived their husbands, their experiences of widowhood were protracted over many years, often beginning in middle age. Consequently, women experienced more isolation and economic hardship in old age. Further to conjugal differentials, caring relationships were typically gender-specific. Women as a majority provided older family members with informal care, often as late middle-aged or older women themselves. Similarly, older women outnumbered older men as recipients of formal care. Women and men thus experienced old age quite distinctively, and conducted themselves as older people accordingly.¹³ In addition to social and demographic considerations, gender determined the nature of economic arrangements executed on behalf of older people within their families.

Traditionally, the Scottish family has functioned as a social and economic resource for all living generations of family members. The family experience in the nineteenth and twentieth centuries was no exception. Prior to the adoption of formalised statutory old-age services *post* 1946, the family was the primary source of support and relief in old age. Caring relationships¹⁴ and social contact with family members in the more recent past were comparably valuable to older recipients. Indications of contemporary social mores and external pressures, intergenerational

¹³ Bourdieu uses the concept *habitus* to describe social structures and practices. He has constructed *habitus* in three parts. Firstly, *habitus* exists as individual subjectivism, *viz* personal knowledge; secondly, the *habitus* exists in the practices of actors and their interaction with each other; and lastly, the *habitus* is expressed as a practical taxonomy based on duality, such as male/female. It is these subjective and objective components of *habitus* that will operate as a basis of analysing the historical incidence of differentiation between older men and women. See P. Bourdieu, *Outline on a Theory of Practice* (1977).

¹⁴ A 'caring relationship' can be defined as the practice of informal care, a social relationship linking affection and service as 'care'. See H. Graham, "Caring: a Labour of Love", in Finch and Groves, *A Labour of Love: Women, Work and Caring* (1983).

relationships were maintained as sources of capital.¹⁵ Irrespective of class, the importance of the kinship network was paramount in old age. Personal accounts emotively express the significance of family, often in relation to the loss of it. As an affective investment of time, family networks also provided older people with economic stability and a source of interdependence. The exchange of mutual support took various forms, ranging from informal care and more formalised economic arrangements, to the collectivisation of resources and space by the formation of intergenerational households. In the absence of family, older people actively sought relationships with close friends, members of social clubs, churches, or voluntary organisations, and neighbours. Such fictive kin networks were an important alternative to more conventional family forms. In all respects, families' responses to the socio-economic imperative of caring for their older family members were constrained by their circumstances and environment.

The experience of growing older in Scotland in the late modern period has been impacted by dynamic economic and social change. However, it can be argued that the family remained a stabilising force in older people's lives, irrespective of influences such as migration or the introduction of the welfare state. This is largely a reflection of the nature of the Scottish family. Historically a mobile people, Scots endeavoured to maintain family connections, despite geographical separation. It was the exception, and not the rule, when older people were isolated from their families in entirety. Although men and women experienced family life differently in old age, the significance of intergenerational relationships was universal. Clannish kinship networks were the norm for most families in the nineteenth century; similarly, older people in the twentieth century considered their families to be their most important resource. Families in general

¹⁵ Capital in this sense is an incorporation of socio-economic resources accumulated over a lifetime. Bourdieu differentiates these resources into four categories: Economic capital, social capital (various kinds of valued relations with significant others), cultural capital (primarily legitimate knowledge of one kind or another), and symbolic capital (prestige and social honour). Explanation by R. Jenkins, *Pierre Bourdieu* (1992), p. 85.

have benefited from an absolute improvement in living conditions, which has been factored into comparisons of the quality of life between particular age cohorts as well as within a specific cohort. The most observable change overall has been the impact of the state pension and statutory services, which has helped families facilitate care and make better choices for their older family members.

CHAPTER ONE

OLDER PEOPLE AND THEIR FAMILIES

c. 1845-1945

**OLD AGE IN SCOTLAND
IDENTITY AND STATUS, 1845-1945
(1.1)**

The gradual increase in numbers of people over sixty years of age in Britain before the Second World War raised important questions about the long-term effects of an ageing society. Central to these questions was a general concern about a growing population of older people. Dire predictions¹ of a contracting population and increases in dependency ratios punctuated demographic analyses of older population groups. More reasoned discourse concerning old age concentrated on very specific applications of the nascent welfare state, yet also tended to suffer from a lack of knowledge. Because gerontological work was confined to a small area in medicine, contemporary study in relation to ageing was limited. Not surprisingly, more fundamental questions about growing older were left unasked. What, for example, did it mean to be an older person at a time when the likelihood of reaching old age had increased? The philosophical questions concerning the social constituents of old age as an identity have more recently become a line of enquiry. Understandings of what is old have proven to be elusive; vague impressions of old age are a reflection of contradictory methods of measuring old age and external perceptions which often fail to correlate with authentic experiences as an older person. However, a careful study of older people's status in Scotland between 1845 and 1945 would suggest that their identity was largely fixed in relation to their familial roles, rather than chronology.

Instead of identifying older people on the basis of chronologisation in itself, more useful methods of measuring old age can be obtained from the social sciences. Specific work in this area has been undertaken by the sociologist John Vincent, the basis

¹ The most vocal of these were demographers and economists, who utilised some of the arguments put forth by eugenists, advocates of improving the qualities of human populations.

of his work reads on the argument that older people form a separate identity group.² Vincent explores the notion of old age as an identity from two different points. Firstly, he describes age differentiation in terms of social reproduction, and he argues that there is a long-term understanding of age as an ‘other’ group- hence, an historical practice of social differentiation.³ Secondly, he defines old age in terms of the patterns of cohort and generation. The former concept of cohort provides an important basis for understanding the context of particular older population groups. An age cohort is located in history, bound by the material circumstances in which it has lived, and structured by many social changes, which include: life-history processes, family processes, job market processes, and cohort processes, among others.⁴ Vincent rightly points out that a particular cohort shares a commonality fixed in time, thus differentiating them from prior or subsequent age cohorts. This differs from the use of generation, which merely demarcates a gap in age such as between children, parents, and grandparents. The combination of generation and cohort as identifiers provides the basis for differentiation. Therefore, older age cohorts comprise an identity group based on their *locus* in history and their stage in the life course.

An overemphasis on measuring the boundaries of old age has clouded understandings of the social experience of growing older. Chronological age itself is an insufficient indicator of ageing as such. Arguments between British political and charitable bodies concerning the onset of old age resulted in a wide range of applications of chronological age.⁵ At one extreme, the Friendly Societies Act of 1875 defined old age

² Anthea Tinker observed that elderly people are one of the largest ‘special groups’, and pointedly added that they form a group to which in due course most people will belong. A. Tinker, *Elderly People in Modern Society* (1992, 3rd ed.), p.4.

³ J. A. Vincent, *Inequality and Old Age* (1995), p.179.

⁴ Vincent, *Inequality*, p.182.

⁵ Disagreement about the onset of old age in the latter decades of the nineteenth century dominated debates concerning the old age pension. Most recent debates in British Parliament mooted the age of seventy to be the minimum age for the state pension has again raised questions about the relevance of linking old age with chronological age.

as any age after fifty.⁶ Trade unions defined old age from the age of fifty or fifty-five with the rationale that by that age labourers lacked physical strength. The problem of work in old age for the working classes forced Joseph Chamberlain MP to re-define the parameters of old age. In an 1892 report, Chamberlain termed old age as any age exceeding sixty in reference to the working classes.⁷ Ultimately, the formalisation of pension policy over time made several adjustments on the basis of age. Interestingly, the pensionable age was set at seventy years of age in 1908, fixed at 65 with the introduction of insurance pensions in 1925, and reduced for women from 65 and 60 in 1940. It is significant that poor law authorities were *not* inclined to determine a set age demarcating old age.⁸ Economic and political motivations to identify age based on chronology therefore do not correspond with ageing *per se*. The American sociologist D.W. Nelson succinctly argues this point: ‘Chronological age does not correlate reliably with many socially important characteristics. It does not determine and hence does not predict attitudes, health, interests, education, family relationships, work capacity, or intellect’.⁹ Thus, definitions of old age must remain flexible, not static.

An important question to consider is the qualitative nature of the transitions¹⁰ involved with ageing during the nineteenth and early twentieth centuries. Two theoretical approaches based on functionality¹¹ in old age are expressed in the form of ‘ages’. Dr John Smith introduced the first of these approaches in 1666. Smith provided

⁶ There would have been tremendous ramifications in terms of the roles (and coffers) of Friendly Societies and voluntary organisations if retirement had included everyone above the age of fifty. As it stood, Friendly Societies were ill-equipped for a growing number of members living well into old age. P.H.J.H. Gosden, *Self-Help: Voluntary Associations in the Nineteenth Century* (1973), p. 266.

⁷ C.S.Loch, *Old Age Pensions and Pauperism* (1892), p.6.

⁸ For a more critical analysis of the *ad hoc* nature of Poor Law policy, see the fourth chapter of this thesis as well as L. Botelho and P. Thane, (eds) *Women and Ageing in British Society Since 1500* (2001), p. 210.

⁹ D.W. Nelson, “Alternative Images of Old People as the Bases for Policy”, in B.L. Neugarten, (ed.) *Age or Need: Public Policies for Older People* (1982), p. 21.

¹⁰ Sara Arber discusses such transitions in life course theory, which will be discussed at greater length in the second chapter of this thesis. S. Arber and M. Evandrou (eds), *Ageing, Independence and the Life Course* (1997), p. 12.

¹¹ Functionalism is applied to older people in terms of the social and economic functions they can fulfil within their environment. There is an implication in this theoretical model that older people are less valued if they are less ‘functional’.

a functionalist definition of old age comprised of various practices such as productivity, contribution, independence, dependency, and health. He established three divisions of old age, in which he described a 'green' old age, when men [and women] could still work well, a 'full' good old age, and 'the sickly, decrepit, ever growing old age'.¹² The gerontologist Peter Laslett's modern approach based on four ages over the life course similarly incorporates young-old age and old-old age. The latter 'ages' are roughly parallel to Smith's green old age and ever growing old age.¹³ Laslett's application of 'ages' is an interesting tool for interpreting the social experience of old age. Specifically, the key constituent of his third age as the period of time devoted to personal achievement¹⁴ involves a tremendous transformation in terms of choice of pursuits, social imperatives and identity. Laslett argued that: 'The coming of the Third Age from the individual point of view is personal: of itself it has little to do with calendar age, social age, or even biological age'.¹⁵ One can thus understand old 'ages' as developmental life processes determined by variables other than chronological age.

As applied to nineteenth and twentieth-century Scotland, class limited the fulfilment of all the ages. This is exemplified by the overrepresentation of middle-class biographies written before the Second World War. In a fair number of these texts, references were made to being a 'green old' person. For instance, the Reverend Thomas Erskine was observed by friends and family members to be 'a young-old man' to the end. At the age of seventy he wrote: 'I sometimes feel as if I were a boy still'.¹⁶ His station in life undeniably determined his attitudes towards ageing and quality of life as an older person. Contrastingly, the few existing Scottish working-class narratives reveal a

¹² J. Smith, *Portrait of Old Age*, referred to in P. Thompson, C. Itzin, and M. Abendstern, *I Don't Feel Old: The Experiences of Later Life* (1990), p. 20.

¹³ P. Laslett, *A Fresh Map of Life: The Emergence of the Third Age* (1996), p.131.

¹⁴ Peter Laslett has been roundly criticised for his middle-class approach to his third age, because much of what he describes as personal achievement is not financially attainable or desirable to many older people.

¹⁵ Laslett, *Fresh Map of Life*, p. 192.

¹⁶ Letter dated 1858, in W. Hanna, *Letters of Thomas Erskine* (1877), p. 178.

foreshortening of the ‘full’ good old age. Although this was principally true for men, women were often worn out by work before middle age. In her introduction to her collection of autobiographical poems, the factory girl Ellen Johnston recalled:

My stepfather was unable longer to work, and my mother was also rendered a suffering object [for several years]...and died [at the age of forty-three]...and I, who had been the support of the family, was informed by my medical adviser that, unless I took a change of air, I would not live three months. [She died before her thirty-eighth birthday.]¹⁷

Although Ellen Johnston’s case was extreme, premature ageing commonly resulted from early childbirth patterns, poor health, and overwork. Thus, Johnston’s family experienced most of the attributes of old age: Ellen’s child was looked after by her ailing mother, with whom Ellen and her daughter lived, Ellen worked in order to provide support for her ageing parents, and she herself experienced the inability to remain employed on the grounds of infirmity. Indeed, her retirement from work was quickly followed by Smith’s ‘ever growing old’ age. For many families, old-old age involved a significantly shorter or even non-existent period of time, relative to the individual’s life experiences and longevity¹⁸ as such. Nonetheless, what older people had in common is more striking than the class differences between them.¹⁹

Modern attempts to determine the constituents of old age as a social identity arise from reinterpretations of original sources and historical perceptions of older people. Such documentation regarding the status of older people in nineteenth and early twentieth-century Scottish society are sadly few and far between. Problematically, more readily accessible sources involving the subject of old age that do exist often fail to provide an accurate representation of old age. Contemporary government reports, social commentary, and artists’ works are merely fragments of society’s view of its older

¹⁷ E. Johnston, *Autobiography: Poems and Songs of Ellen Johnston, “The Factory Girl”* (1867), p. 11.

¹⁸ Christopher Kerr, a Dundee town clerk, opined that nothing short of unremitting care, coupled with the most exemplary abstemiousness and temperance of living, would have enabled him to protract his hard working life beyond the allotted space of threescore and ten. W. Norrie, biography of Christopher Kerr, in *Dundee Celebrities of the Nineteenth Century: A Series of Biographies* (1873), p.335.

¹⁹ See P. Thompson, C. Itzin, and M. Abendstern, *I Don’t Feel Old: The Experiences of Later Life* (1990), p.11.

members. As a collective whole, however, these public representations are quite useful in interpreting the normative attitudes of Scottish society concerning old age. Not surprisingly, popular perceptions are contradicted by biographical material and reminiscences of growing older. The few Scottish biographers who discussed their lives or older family members' lives as older people articulate their consciousness of becoming an older person. Unfortunately, the relative dearth of personal accounts of ageing and being an older person limits the scope of the examination of internal perceptions.²⁰ Until more recently²¹, external perceptions have disproportionately influenced historical understandings of what constitutes old age. The effect of this poses the question, what sources most accurately address the nature of status in old age?

The most objective sources measuring old age are inherently the least likely to elucidate the question of Scottish older people's status. However, much can be inferred from the quantitative aspect of population change over time. A longitudinal analysis of population growth during the period 1851-1931 makes it clear that the proportion of people aged sixty and above in Scotland was quite stable. (See Table 1.1) Arguably, because older people comprised no more than ten per cent of the population until after the First World War, those who lived beyond the age of sixty would have occupied a specific status based on their relative scarcity. This can be interpreted in two ways. Firstly, because the average life expectancy was under sixty years of age prior to 1900, those who reached old age would have been deemed to be exceptional; and, secondly, older family members were likely to have a wide variety of relationships because younger people profoundly outnumbered older people. It is therefore striking that when older

²⁰ Both Paul Johnson and Paul Thompson address the problem of the lack of material in their discussions of status in old age, especially concerning older people from the working classes. P. Johnson and P. Thane, (eds) *Old Age From Antiquity to Post-Modernity* (1998) and Thompson, et al, *I Don't Feel Old*.

²¹ Only within the last decades of the twentieth century has this problem been addressed. A group of modern historians and sociologists have contributed to an important reinterpretation of old age and the unique roles older people hold in society. Some are Andrew Blaikie, Paul Johnson, Peter Laslett, Chris Phillipson, Pat Thane, Paul Thompson, Anthea Tinker, Peter Townsend, John Vincent, and Richard Wall.

populations increased in the interwar period, census takers failed to address the significance of a greater number of older people living past the age of 60 by 1931. One blandly observed that: 'The increasing proportion of persons in later years of life tends to mask the improvements in the death-rates'.²² Government reports such as the census thus conveyed very little in terms of overt value statements.

More explicit in terms of the transmission of beliefs and mores concerning old age, commission reports²³ and social investigators' reports from studies conducted in Great Britain between 1885 and 1910 articulated moral judgements. Many of these strongly indicate societal expectations for moral behaviour. Arguably, such expectations were magnified in old age. In his investigations in England and Wales, Charles Booth observed a strong dislike of 'decent' older people being compelled to mix with those whose lives and habits were the reverse of their own respectable lives.²⁴ Respectively, Seebohm Rowntree emphasised older people's character in his 1899 study of poverty in York. An entry for a seventy year-old woman read: 'Widow; disreputable old woman...gets parish relief'.²⁵ Respectability in old age was also emphasised in the Scottish Board of Supervision reports. One visiting officer, Malcolm McNeil, stressed the importance that '...the [aged] pauper is a person of good character'.²⁶ The predominance of opinion concerning the *deserving* aged poor is a reflection of idealised perceptions of how older people should conduct themselves. Moralistic writings provide important clues as to the qualitative nature of the socially-constructed identity of old age.

²² BPP. *Census of Scotland, 1931* (1933), p. xxix.

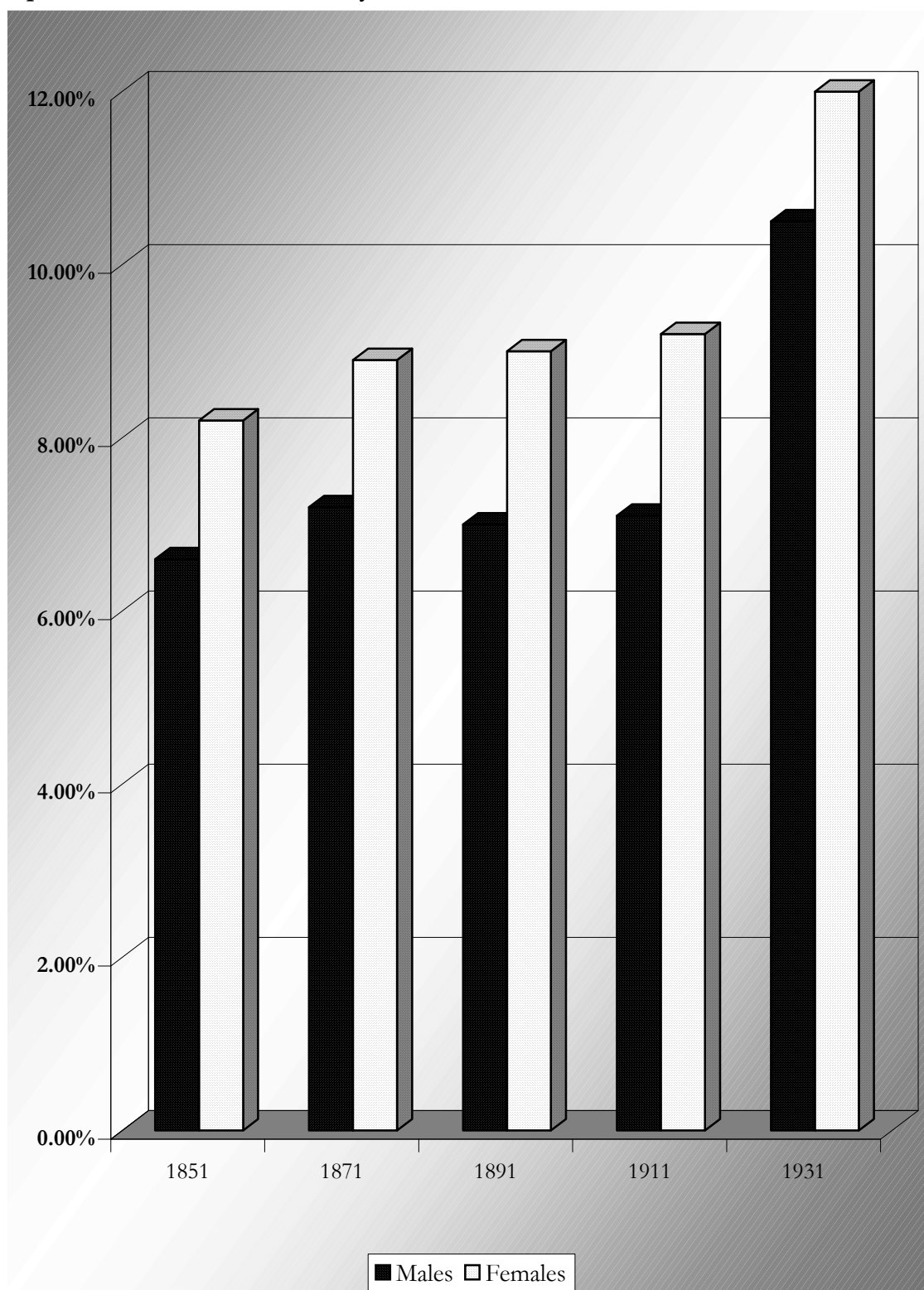
²³ It cannot be stressed enough how frequently Royal Commissions for the Poor Law expressed moral considerations as regards policies for older people. See BPP. *Royal Commission on the Aged Poor* (1895).

²⁴ C. Booth, *The Aged Poor in England and Wales* (1894), Pp. 330-331.

²⁵ B.S. Rowntree, *Poverty: A Study of Town Life*, 2nd ed. (1902).

²⁶ Half-Yearly Report by Visiting Officer (June 1872) in *Annual Report of the Board of Supervision, 1873*, referred to in I. Levitt, *Poverty and Welfare in Scotland 1890-1948* (1988), p. 18.

Table 1.1: Older Populations Aged 60 and Above as a Percentage of the Total Population in Scotland at Twenty-Year Intervals, 1851-1931



[Source: Personal calculations using material from selected decennial censuses. BPP, *Census of Scotland*; 1851, 1871, 1891, 1911, and 1931]

More robust examples of external perceptions of older people's status in late nineteenth-century society can be found in Scottish literary and artistic impressions. The arts and the press produced images of older people as independent and responsible members of society; for the most part, such images are instructive. A letter to the editor in *The Scotsman* portrays a noble senior citizen: 'Dawson Roddick, a white-haired *venerable* old man, wearing a shepherd's plaid, [stood before the court as a witness]'.²⁷ The obviously active civic role played by an older person should not be overlooked. Most older people, principally spinsters and widows, remained independent, occasionally leading solitary lives. The Scottish artist Hugh Cameron's painting, *A Lonely Life* (1873), sympathetically renders a 'Heilan Annie', capturing the stereotypical Scottish Highland widow's experience. (See Illustration A) The painting is particularly moving due to careful details such as the grim resignation on her face. Cameron produced a work that lends dignity to old age, but also serves as an object of social commentary. The theme of obsolescence, coupled with a reverent sketch of senior status in old age, was romantically depicted in J.M. Barrie's Kailyard novel *Auld Licht Idylls* (1889). Although Barrie's very old family in Thrums is an ahistorical representation of older people in a pre-industrial paternalistic system, contemporary practices of patriarchy are warmly expressed. The seat by the fireside is reserved for the old father, but when he leaves the room, his eldest son is encouraged to occupy the seat in his absence.²⁸ The oldest member of the family is thus afforded respect and affection on the grounds of his status.

The attributes of an identity group are partially based on the socialisation process, hence external constructions complement internalised perceptions resulting from experience. This is most true in terms of old age, because individuals undergo a process in which objectivity is superseded by subjectivity. This transformation has been

²⁷ Letter, *The Scotsman*, 18 January 1859.

²⁸ J.M. Barrie, *Auld Licht Idylls* (1889), pp. 213-214.

eloquently acknowledged by several Scots, who expressed their personal understandings of their new identity as older people.

Illustration A: *A Lonely Life*, Hugh Cameron (1873)



[Source: Courtesy of the National Galleries of Scotland Picture Library]

The writer Thomas Carlyle wrote many letters to this effect. Several years after he was widowed Carlyle wrote:

It is the saddest feature of old age that the old man has to see himself daily grow more lonely; reduced to commune with the inarticulate Eternities, and the loved ones now unresponsive who have preceded thither. Well, well: there is a blessedness in this too, if we take it well. There is a grandeur in it, if also an extent of sombre sadness, which is new to me; nor is hope quite wanting, nor the clear conviction that those whom we would most screen from some pain and misery are now safe and at rest. It lifts me to real kingship withal, real for the first time in this scene of things. Courage, my friend; let us endure patiently, and act piously, to the end.²⁹

His recognition of the transition of becoming older reflects the social aspect of such experiences. In addition to the adoption or loss of various social roles and relationships, the ageing process itself demarcates old age from middle age. On revisiting the scene of her childhood in 1895, the twice-widowed domestic servant Janet Bathgate wrote a poem incorporating reminiscence and quiet reflection on her present state. In one stanza, Aunt Janet wrote: 'Threescore and ten years have gane o'er/My weary head this day/The chestnut locks that graced my neck/Are changed to silver grey'.³⁰ Like Carlyle, Janet Bathgate's commentary on the experience of feeling her age is unusual because many biographers sketchily addressed their feelings about growing old, often relegating the subject to a final chapter or afterword. The foreshortening of personal narrative concerning old age suggests a desire to retain particular characteristics usually associated with a younger identity such as autonomy and involvement.³¹

The survey of primary sources indicates that old age was a complex period of psychological and social processes, underpinned by active adaptation. Specific roles arose from these changes, reflecting shifting imperatives as well as the unique status of being

²⁹ W. Knight, *Some Nineteenth Century Scotsmen: Being Personal Recollections* (1903), p.181.

³⁰ J. Bathgate, *Aunt Janet's Legacy to Her Nieces: Recollections of Humble Life* (1898), p. 201.

³¹ The psychologist Erik Erikson argues that: 'Vital involvement [in old age] is characterised by a sense of reality that is active and, in fact, an interactive involvement within a communal actuality, and a shared sense of we within a communal mutuality'. E. Erikson, et al, *Vital Involvement in Old Age* (1986), p. 53.

older. For example, the practice of remaining the head of household in old age provided older people with influence and stability within their families. In typical circumstances in urban Scotland, men remained the head of their households in old age, regardless of whether the house was his own or a younger family member's. Quite distinctively, single³² older women were the head of their own households, but were listed separately when in residence in an adult child's home. Out of a controlled sample of 300 households in Dundee and Edinburgh from 1851 and 1901 census enumerators' reports, it is evident that age, more so than gender, was the principle factor in determining who was the head of household. (See Tables 1.2-1.5) The idiosyncratic nature of the Scottish census is an indication of the practice of conferring higher status to older householders. Interpreting the nature of this role quantitatively leads to further inquiry concerning the distribution of capital within the family. In her work on the British census, the gerontologist Tamara Haraven asked: 'When a household record in a census lists a parent as being the head of household and an adult child as residing in the household, who in reality heads the household, and what are the dynamics of flow of assets and assistance?'³³ Her question provocatively suggests that in some instances the head of household was a figurehead rather than the source of authority or economic influence. This interpretation is applicable within the context of Scotland's predominantly urban communities, given the practice of pooling resources in intergenerational households. In the case of matrifocal networks such as those in Dundee in which women significantly contributed to the household purse and wielded greater authority in the domestic sphere, older men's status as head of household was nominal. The social practice of conferring head of household status to older family members can thus be understood as a convention originating in a patriarchal society.

³² Single status in this usage includes both widows and spinsters.

³³ T. Haraven, ed. *Aging and Generational Relations Over the Life Course: A Historical and Cross-Cultural Perspective* (1996), p. 7.

Table 1.2 Distribution of Household Population Enumerations in Edinburgh, 1851

<i>The Canongate, Edinburgh 1851</i>					
Household Distributions	Male Head	Female Head	Head Age 50+	Head Age 60+	Households
Single	1	8	5	3	9
Married Couple	14	0	6	1	14
Married Couple with Family	13	0	3	1	13
Married Couple with Lodgers	4	0	3	1	4
Married Couple with Family and Lodgers	9	0	1	0	9
Married Couple with Family and Others	2	0	0	0	2
Single with Family	4	8	8	4	12
Single with Lodgers	0	2	2	0	2
Single with Family and Lodgers	0	10	0	2	10
Totals	47	28	28	12	75

[Source: M. Anderson. *Enumeration of 1851 Census Population*. University of Edinburgh, 1984.]

Table 1.3 Distribution of Household Population Enumerations in Dundee, 1851

<i>The Hilltown, Dundee 1851</i>					
Household Distributions	Male Head	Female Head	Head Age 50+	Head Age 60+	Households
Single	0	6	4	2	6
Married Couple	6	0	4	1	6
Married Couple with Family	13	0	3	1	13
Married Couple with Lodgers	3	0	1	1	3
Married Couple with Family and Lodgers	5	0	2	1	5
Married Couple with Family and Others	6	0	4	2	6
Single with Family	5	7	9	3	12
Single with Lodgers	0	6	5	3	6
Single with Family and Others	0	3	1	1	3
Single with Family and Lodgers	1	14	10	3	15
Totals	39	36	43	18	75

[Source: M. Anderson. *Enumeration of 1851 Census Population*. University of Edinburgh, 1984.]

Table 1.4 Distribution of Household Population Enumerations in Edinburgh, 1901

<i>The Canongate, Edinburgh 1901</i>					
Household Distributions	Male Head	Female Head	Head Age 50+	Head Age 60+	Households
Single	0	7	6	6	7
Married Couple	11	0	3	1	11
Married Couple With Family	22	0	6	2	22
Married Couple with Lodgers	2	0	1	0	2
Married Couple with Other Family	3	0	1	1	3
Married Couple with Family and Lodgers	4	0	2	0	4
Married Couple with Family and Others	2	0	1	0	2
Married Couple with Others and Lodgers	1	1	1	0	1
Married Couple with All Categories	3	0	0	0	3
Single with Family	3	9	8	1	12
Single with Family and Lodgers	0	3	0	0	3
Single with Family and Others	1	4	3	2	5
Totals	52	23	30	13	75

[Source: GRO Census Enumerators' Reports, 1901. Filmed at New Register House, Edinburgh, 2001.]

Table 1.5 Distribution of Household Population Enumerations in Dundee, 1851

<i>The Hilltown, Dundee 1901</i>					
Household Distributions	Male Head	Female Head	Head Age 50+	Head Age 60+	Households
Single	0	10	7	4	10
Married Couple	6	0	2	2	6
Married Couple with Family	24	0	11	4	24
Married Couple with Lodgers	1	0	0	0	1
Married Couple with Family and Lodgers	2	0	1	0	2
Married Couple with Family and Others	5	0	1	1	5
Single with Family	4	4	5	3	8
Single with Lodgers	0	5	3	3	5
Single with Family and Lodgers	1	7	2	1	8
Single with Family and Others	2	4	4	3	6
Totals	45	30	36	21	75

[Source: GRO Census Enumerators' Reports, 1901. Filmed at New Register House, Edinburgh, 2001.]

Within their families, older people's generational roles were fairly well-defined. Traditional roles such as the patriarch and matriarch stemmed from Scottish customs and practices, and were moderately adapted in the modern period. Loosely modelled on particular roles such as the clan chief or the local laird, the patriarch or the matriarch of the family had certain responsibilities³⁴ and privileges. Patriarchs in wealthier families enjoyed a higher status based upon control of rights and the ownership of property or land. Furthermore, the patriarch or matriarch were consulted³⁵ and deferred to by other family members, even those of a similar age. Interestingly, not every old person maintained this status; to be the patriarch or the matriarch of the family was contingent upon various factors, including ordinal position in the extended family. Thus patriarchy is distinct from other generational roles such as the head of household or grandparent. Although nineteenth and twentieth-century sources tend to not refer to these family relationships with this nomenclature, it is evident that some families informally observed a patriarchal model of familial organisation. The father of James Gow, the Dundonian weaver poet, performed religious duties with his family as the patriarch. "They united twice a day with unvarying regularity at the family altar for "the reading"...they all knelt down, the father engaging in prayer. The service was kept up till...the old pensioner died, in the 81st year of his life, and the family was then broken up'.³⁶ In her autobiography, the writer Lyn Irvine describes the economic roles her grandfather played in his family. In the interwar period, his sons and daughters-in-law, twenty grandchildren, and nieces and

³⁴ One such duty for the patriarch to this day is taking the first chord or leading the procession behind the coffin at funerals for family members. Matriarchs were notably influential in the family sphere in terms of moral issues and arranging marriages. *Conversation with John Durst*, Fife, 5 August 2004. See J. Goody *The European Family* (2000).

³⁵ Born in 1870, Jane Gailey's father has been remembered as the decision maker for her entire family. After her uncle's death in the Great War, Jane's adult cousin turned to her father *in loco parentis*. A few of her nephews approached her father several times for work references. *Interview with J. Gailey*, Edinburgh, (25 May 2004). N.B Each name of the interview subjects has been changed to honour their wishes for privacy.

³⁶ W. Norrie (ed.), "James Gow", in *Dundee Celebrities of the Nineteenth Century: Being a Series of Biographies of Distinguished or Noted Persons* (1873), p. 383.

nephews with their children paid an annual summer visit to Lyn's grandfather's³⁷ home in the borders. Regardless of geographical distance or cost, family members converged to celebrate the older gentleman's birthday. In addition to the social dimension of these visits, it was a time when her grandfather would undertake financial arrangements for those requiring his assistance. 'Assurances [were given] that if there are other moments of need in the future they could turn again to him'.³⁸ As an older man, the journalist William Power recalled the social prominence of his paternal grandmother in the family. 'The characteristics of the Scott clan were embodied in my grandmother. She was rather like Queen Victoria ...[she informed and advised.]'³⁹ Older people such as Power's grandmother and Irvine's grandfather enjoyed a unique status relative to their age and primacy within the family.

In contrast to the limited likelihood of holding patriarchal roles, many older people in Scotland experienced the status of grandparenthood. Not surprisingly, grandparents occupied a diverse range of roles with their grandchildren, determined by their own temperament, the regularity of their contact with their grandchildren, and their relationships with the rest of the family. In various nineteenth and twentieth-century biographical accounts, the nature of these roles are addressed. A majority of grandparents were portrayed in a specific manner, indicating a particular mode of status based on formality and respect.

'Grandpapa, your grandfather, Father: three holy names, the first tentatively affectionate; the second frankly awe-inspiring and usually connected with the conveying of some interdiction; the third- and it only concerned the grownups- so expressive of the remoteness and respect that tempered the affection borne him by his sons and daughters, our uncles, mothers, and aunts, that I never connected it with my own father'.⁴⁰

³⁷ It is interesting that Lyn Irvine at all times refers to her grandfather as 'Grandfather' and never by name.

³⁸ L. Irvine, *So Much Time, So Little Money* (1957), p. 41.

³⁹ W. Power, *Should Auld Acquaintance: An Autobiography* (1937).

⁴⁰ J.T. du Cros, *Cross Currents: A Childhood in Scotland* (1997).

As well as grandfathers, grandmothers were remembered with reverence and awe. In one of his semi-autobiographical stories about family life in Dundee, Graham Donachie observed: 'My grannies appeared to me like twa ominous black bogles, their mode of dress being what every granny wore at the tyme... Black was the required colour for grannies. They had all the 'glitz and glamour' of Mr Ford's early Model T's. Their visage, as black as any corbie, they could scare with a glare, the most boisterous of us bairns'.⁴¹ Admittedly, not every grandparent evoked such tremors as this. In his letters to his youngest grandchild, the Reverend Thomas Chalmers very warmly expressed himself. In one letter written in his sixty-first year, Chalmers lovingly admonished his four year-old grandson. 'Why do you like your hobby-horse better than your grandpapa? The hobbyhorse cannot write letters to you like grandpapa, neither can he buy toys for you and send them from Edinburgh; neither can he show you pictures, or do for you any of those things which you best like'.⁴² Grandparenting was thus important to older people. Even in the absence of grandchildren of their own, some older women and men informally acted as grandparents. A Dundee shopkeeper wrote in his autobiography about the neighbour's child, Adeline, who paid daily visits to his home. When writing about her tragic death, he mused: 'It was only the friendship of an old man for a neighbour's child. [And yet] with the exception of my mother, I have felt no such void in my heart as I felt when Adeline passed away'.⁴³ In addition to emotional ties, many relationships were shaped by proximity to their grandchildren.

Prior to the time period after the Second World War, most older people and their families who lived in urban areas in Scotland were affected by housing shortages and high rents. Consequently, grandparents often lived in the same house as their grandchildren. This took two forms. Either the entire family may have shared a house or

⁴¹ G. Donachie, *The Tale of Twa Grannies* <www.electricscotland.org> (25 May 2002).

⁴² W. Hanna, *Memoirs of the Life and Writings of Thomas Chalmers, D.D. LL.D.* (1852).

⁴³ A.C. Adams, *The History of a Village Shopkeeper: an Autobiography* (1876), p. 300.

one of the grandchildren may have been asked to stay with grandparents on the basis that there were too many children in their parents' house.⁴⁴ One effect of intergenerational housing was that grandparents often had parenting responsibilities for their grand (or sometimes great-grand) children. As an older woman in the 1980s, Rosina Sligo shared recollections from her childhood. 'Through the force of circumstances of the 1914-1918 war, my parents' marriage broke up before I was born. My mother left me with her grandmother, who'd already brought up a great family of her own'.⁴⁵ Within living memory, older people in Edinburgh and Dundee recall their families being separated under such circumstances. One Dundonian said she 'lost' her eldest brother to her grandparents in 1927.⁴⁶ Grandparenthood was thus a complex relationship affected by economic and social conditions.

Population patterns in Scotland between 1851 and 1931 reflect the incidence of women outnumbering men. Not surprisingly, the effect this had on marriage prospects for women was significant. A review of census material at twenty-year intervals during the period indicates that as much as a quarter of women aged 60 and above had remained spinsters their entire lives.⁴⁷ Thus, the familial role of the spinster aunt was important. In the absence of a husband and children, most spinsters formed meaningful relationships with family members at each successive generation. Unlike that of the grandparent, the spinster experienced three forms of status over her life course. Firstly, unmarried daughters took the responsibility of caring for older family members, often by living with an ageing parent or grandparent. Such demonstrations of affection and dutifulness were considered quite respectable for spinsters from all stations of life. The unmarried daughter of Peter Carmichael, a managing director of the Dundee textile firm Baxter

⁴⁴ Census enumerators' reports frequently show urban households composed of a single grandchild with either a widow or both living grandparents.

⁴⁵ S. Hemmings (ed.) *A Wealth of Experience: The Lives of Older Women* (1985), p. 107.

⁴⁶ *Interview with Maria Anderson*, Dundee, (3 August 2004).

⁴⁷ Personal calculations from decennial censuses, 1851-1931.

Brothers & Co., stayed in her aunt's home before her death in 1873. 'Euphemia was the darling of her aunt, on whom the charge of the domestic duties in the household now lay, and she was the object of the most tender solicitude and careful nursing'.⁴⁸ Secondly, maiden aunts in their middle years were important to their nieces and nephews, both in terms of caring responsibilities and affective ties. The Edinburgh biographer Eleanor Sillar's Aunt Louisa was an important parental figure for her niece and nephew. 'Auntie lived in rooms. Sometimes Louis and I would spend a Sunday afternoon there, a rare pleasure.... When, after my father's death, [in the early 1880s] it was thought fitting that she should leave her lodgings and come live with us, I am sure it was a sacrifice made for our sakes'.⁴⁹ Lastly, older spinsters formed reciprocal relationships with younger family members, often receiving care in return for resources such as accommodation or monetary exchange. An older woman in Edinburgh recalls her great-aunt in the late 1920s. 'Auntie Alice lived with her nephew, Father's older brother. She was very independent, even when she was unable to walk. She paid for her upkeep and watched my cousins when their mother was away from the house. We [children] respected her; I was always on my best behaviour when I visited'.⁵⁰ Family relationships thus provided spinsters with varied forms of status and duties to fulfil over their life course. Interestingly, older bachelors did not possess an equivalent status to the spinster aunt, an indication of the gendered experience of growing older.

⁴⁸ P. Carmichael, *Reminiscences of the Life and Work of Peter Carmichael, Vol. 3* (c.1890), p. 45 (UDA MS102/1/1-3).

⁴⁹ E. Sillar, *Edinburgh's Child: Some Memories of Ninety Years* (1961), Pp. 123 and 133.

⁵⁰ While going through her father's things a number of years after his death in 1970, Lucinda found numerous letters to him from his aunt. 'These letters clearly expressed the fact that she was exceptionally lonely, and very unhappy in her last years. *Interview with Lucinda Fox*, Edinburgh (14 July 2004).

**OLDER MEN AND WOMEN IN SCOTLAND, c.1845-1945:
SEPARATE SPHERES OF AGEING
(1.2)**

Scottish families retained traditional practices based upon age and gender hierarchies well into the twentieth century. In an era of social and political reform⁵¹, it is noteworthy that families demonstrably lagged behind social institutions in the public sphere. Conventional social mores continued to influence family structures, as evidenced by the proliferation of rigid gender-based roles and responsibilities. Although there is a tendency for historians to critique the perpetuation of gender inequality within the family sphere, the conservative nature of family life must be interpreted in terms of the long-term effects of industrialisation and urbanisation. The reproduction of particularised familial relationships provided Scottish society with a profoundly important source of stability. Qualitative analyses of these practices must be further explored quantitatively. Indeed, the social trends affecting older people and their family life reflect contemporary population patterns, such as the incidence of women outnumbering men. Variability in longevity between men and women, in combination with highly concentrated female populations, typically demarcated older people's status and experiences on the basis of gender. The demographic and social conditions in Scotland between 1845 and 1945 thus operated as a catalyst for the perpetuation of traditional gender roles within the family. A longitudinal examination of conjugal status and familial responsibilities of older age cohorts indicates a magnification of the experience of gender over the life course.

⁵¹ Peter Laslett observed that family patterns evolve slowly, certainly much slower than the forces of political and economic change. P. Laslett, *Journal of Family History*, **12** (1987), p. 263. For further analyses of educational, electoral, and social reforms as outcomes of the Scottish women's movement c. 1860-1918, see E. Breitenbach and E. Gordon (eds), *Out of Bounds: Women in Scottish Society, 1800-1945* (1992); H. Corr and L. Jamieson (eds), *Politics in Everyday Life: Continuity and Change in Work and the Family* (1990); Glasgow Women's Studies Group, *Uncharted Lives: Extracts From Scottish Women's Experiences, 1850-1982*. (1983); E. Gordon "Women's Spheres", in W.H. Fraser and R.J. Morris (eds), *People and Society in Scotland*, vol. II. (2000); and L. Moore, "The Scottish Universities and Women Students, 1862-1892", in J. Carter and D. Withrington (eds), *Scottish Universities: Distinctiveness and Diversity* (1992).

The ideology of separate spheres⁵² provides a useful model for the analysis of the gendered experience of old age. It can be argued that by virtue of gender, older men and women had distinctive roles, conjugal patterns, social networks, obligations, and economic status. Interpretations such as these can be quantified on the basis of demographic material such as marital status and higher incidences of poverty in old age, and qualified by biographical accounts from the period. A feminist study comparing life course transitions and household statuses of Canadian and American women c. 1871-1881 suggests that differences between the two nations centred on gender.⁵³ Rigid gender roles in Scottish society influenced the organisation of families and particularised practices in the community. However, polarised ideologies tend to be problematic in the light of numerous exceptions concerning gender roles. Indeed, recent revisionist work conducted by historians Lynn Abrams and Eleanor Gordon indicates that women's roles were flexible in urban areas. In one study of a middle-class area of Glasgow based upon the census returns of 1851-1891, Eleanor Gordon and Gweneth Nair reported the high incidence of female-headed households.⁵⁴ They argued that the range of both female and male kin in such households indicated the diversity of experience among middle-class women and the degree of their social and residential independence. While such findings can be generalised to both middle-class and working-class families in Dundee and Edinburgh, some caution must be taken when reviewing revisionist analyses of gender relationships in the Scottish family. Older people in Edinburgh and Dundee experienced more diversity as a byproduct of the processes associated with urbanisation and industrialisation. The higher incidence of female employment and female-headed

⁵² The separation of the male-dominated public sphere of production from the female-dominated private domestic sphere of consumption is the basis of feminist discourse concerning gender divisions in the nineteenth century.

⁵³ L. Dillon, "Women and the Dynamics of Marriage, Household Status, and Aging in Victorian Canada and the United States", *The History of the Family* 4 (1999).

⁵⁴ E. Gordon and G. Nair, "The Myth of the Victorian Patriarchal Family", *The History of the Family* 7 (2002).

households, coupled with the demographic patterns of larger female populations and differentiated death rates, challenged traditional gender roles insofar as women were more fully integrated into the public sphere. Therefore, older people's experiences in urban Scotland must be understood as an extension of and as an exception to traditional roles.

A demographic analysis of the preponderance of older women in Scottish population groups must be contextualised within nineteenth-century migration patterns. In the late eighteenth and early nineteenth centuries, agrarian improvement and regional specialisation contributed to urbanisation. The effect of improvement was threefold: firstly, most cottars (tenant farmers) were made redundant by Lowland farm reorganisation and consolidation; secondly, intermittent regional clearances in the Highlands displaced numerous populations; and, lastly, towns and cities met increasing requirements for commercial services. Consequently, many rural dwellers were drawn by greater economic opportunities to towns and cities. The concentration of iron, steel, mining, shipbuilding, and textile industries in the central belt of Scotland specifically attracted hundreds of thousands of working-age men and women. Collectively, these push-pull factors greatly impacted on population patterns throughout Scotland⁵⁵. Arguably, the factor of industrialisation played a greater part in the formation of gender imbalances in the nineteenth and early twentieth centuries. The nature of industry in certain areas determined the disproportionate gender ratios within and between Scotland's cities. Clydeside absorbed a significant portion of migrants in male-dominated heavy industry, whereas women were primarily employed in textile industries in Dundee and domestic service in Edinburgh. Such variations are instructive when comparing

⁵⁵ Although the potato blight also factored into migration patterns, it was not an ongoing process. Scottish historians interpret the push-pull factors of nineteenth-century urbanisation with different emphases. See W. Knox, *Industrial Nation: work, culture and society in Scotland, 1800-present* (1999) and T. M. Devine, *The Scottish Nation* (1999) for two distinct arguments. Comparisons can be made with urbanisation processes in Europe. See P. Bourdelais, "Demographic Changes in European Towns- Examples and Elements for Comparison", *The History of the Family* 5 (2000).

national figures with those of particular regions. (See Table 1.6) Regional population differentials on the basis of gender and age illustrate the disparity between urban and rural areas.

Table 1.6: Proportions of Older Men and Women in Selected Areas, 1851

Counties and Cities	Males Aged 60+ Percentage of Total Population, by Gender (%)	Females Aged 60+ Percentage of Total Population, by Gender (%)	Proportion of Males in Population Aged 60+ (%)	Proportion of Females in Population Aged 60+ (%)
Scotland	7	9	42	58
Inverness	9	11	41	59
Fife	7	8	43	57
Perthshire	9	11	44	56
Argyll	9	11	45	55
Aberdeenshire	8	10	44	56
Lanarkshire	4	6	42	58
Forfarshire	7	8	41	59
Edinburghshire	6	8	38	62
Aberdeen	7	10	37	63
Glasgow	4	6	39	61
Dundee	5	6	39	61
Edinburgh	6	8	36	64

[Source: Personal calculations from BPP, *Census of Scotland, 1851*. N.B Percentages have been rounded to the nearest whole number.]

Table 1.7: Conjugal Status of Selected Populations Aged 60 and Above, 1851

Conjugal Status	Forfarshire ⁵⁶ Males 60+ (%)	Forfarshire Females 60+ (%)	Edinburghshire Males 60+ (%)	Edinburghshire Females 60+ (%)
Single	11	19	11	24
Married	62	26	59	23
Widowed	27	55	30	53
	Banffshire Males 60+ (%)	Banffshire Females 60+ (%)	Roxburghshire Males 60+ (%)	Roxburghshire Females 60+ (%)
Single	10	24	12	21
Married	68	32	60	32
Widowed	22	44	28	47

[Source: Personal calculations from BPP, *Census of Scotland, 1851*.]

⁵⁶ Until the 1931 census, Dundee was incorporated into Forfarshire material. After the 1931 census, Dundee is part of Angus material as well as on its own in recent censuses.

There are two outstanding features in the rural demographic material. Firstly, as an effect of the dynamic flow of younger migrants into urban areas, older people comprised a greater portion of the population in rural communities. The contrast between the counties of Lanarkshire and Argyll provides a particular example of this. Proportionately, there were more than twice as many older people in Argyll than Lanarkshire. This can be explained in terms of migration patterns over time and geographical distance. The two factors are linked in this context, given that more people of working age migrated from peripheral areas, which retained greater proportions of older people well into the twentieth century⁵⁷. Comparative studies of migration and its effect on older people in family systems raise important points about those who remained in rural areas⁵⁸. One effect of greater concentrations of older people was a tendency for conservatism in rural areas. In his study of household mobility in Scottish rural areas, Andrew Blaikie observed that: 'Mothers were central figures in most family networks, and grandmothers, often widows, were crucial to household support. By dint of their nurturing responsibilities, and expectations governing the care of relatives during critical life situations, they became gatekeepers as well as 'kin-keepers''.⁵⁹ Contemporary biographies and oral histories substantially report that families in small communities and isolated areas specifically tended to be more conservative in terms of gendered roles.⁶⁰

⁵⁷ Analysis based on examination of the 1851, 1871, 1891, and 1911 Scottish Decennial Censuses. Similarly, Charles Booth observed: 'The old and the poor remain in the localities from which population goes'. C. Booth, *The Aged Poor in England and Wales* (1894).

⁵⁸ See J. A. Vincent, *Inequality and Old Age* (1995) for his comparative studies of rural Ireland, which he uses to illustrate traditional practices and distribution of power and wealth between generations in the twentieth century. Others have used Ireland as a case study to examine traditional societies and the similarities between rural communities in Britain and those in Ireland. C.M. Arensberg and S.T. Kimball, *Family and Community in Ireland* (1940).

⁵⁹ A. Blaikie, "Household Mobility in Rural Scotland: the Impact of the Poor Law After 1845", *Scottish Tradition* 27(2002), p.28.

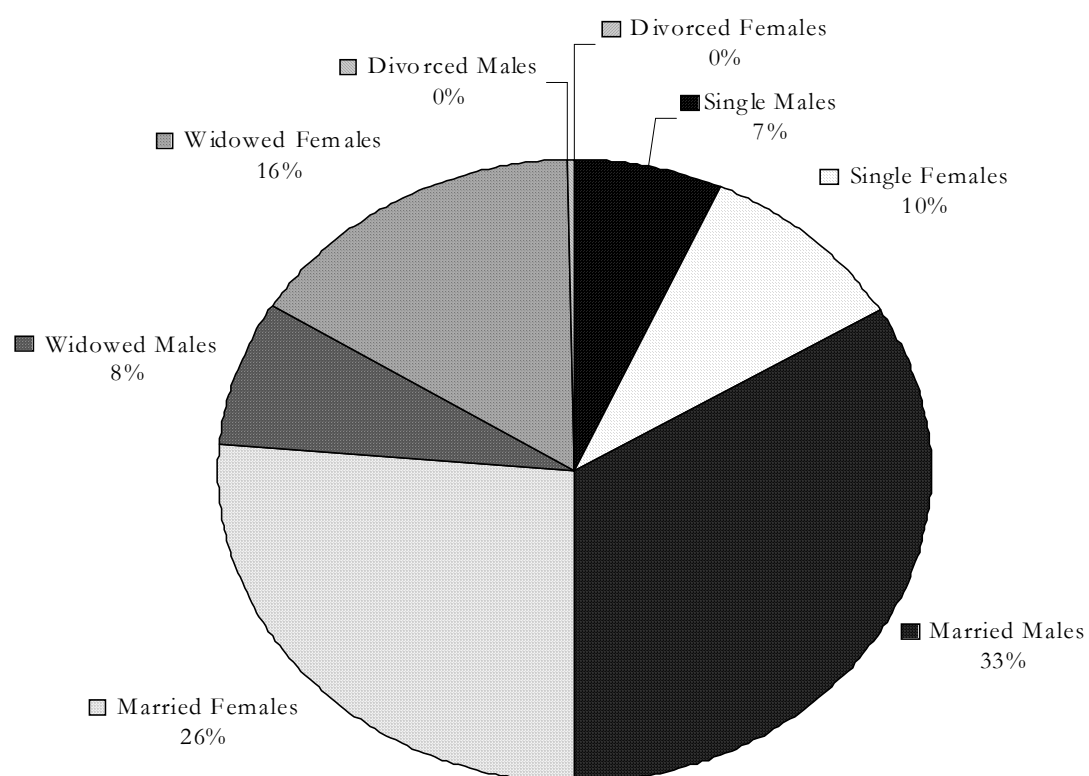
⁶⁰ A few examples of such sources include J. Bathgate, *Aunt Janet's Legacy to Her Nieces* (1898); M.G. Clarke, *A Short Life of Ninety Years* (1973); J.T. du Cros, *Cross Currents: A Childhood in Scotland* (1997); C.G. Gardyne, *Records of a Quiet Life, 1831-1912* (1915); D. Johnston, *Autobiographical Reminiscences of David Johnston, an Octogenarian Scotchman* (1885); A. Smith, *Women Remember: An Oral History* (1989); and W. Thom, *Rhymes and Recollections of a Handloom Weaver* (1880). A number of women I spoke to whose families were from outlying areas such as Harris, Oban, Dumfries, Melrose, and Sutherland all confirmed that in the time of their grandparents' generation, c. 1860-1930, families were very much still traditional in their attitudes- more so

Secondly, women and men achieved relative parity at particular age groups in rural areas, women only moderately outnumbering men in old age. Roxburghshire is a notable example of this, in that women comprised no more than 55% of the population above the age of 60. In most rural counties, it was only at age brackets above seventy-five years of age when the proportions of females markedly exceeded those of older males. One effect of a more balanced gender ratio in such areas was that a greater proportion of older people were married.⁶¹ (See Tables 1.7 and 1.8) The contrast between rural and urban conjugal status and family structure raises further questions concerning the feminisation of older urban population groups.

than in urban areas at the same time. *Interviews with Mrs MacLeod, Winifred Staddon, Anne Mac Dougall, Mary Smith, and Jane Gailey*, Edinburgh, (25-28 May and 14 July 2004).

⁶¹ Population and conjugal data taken from BPP, *Census of Scotland, 1851*, pp. 900-904.

Table 1.8: *Conjugal Condition of Older People in Large Burghal Areas, 1931*



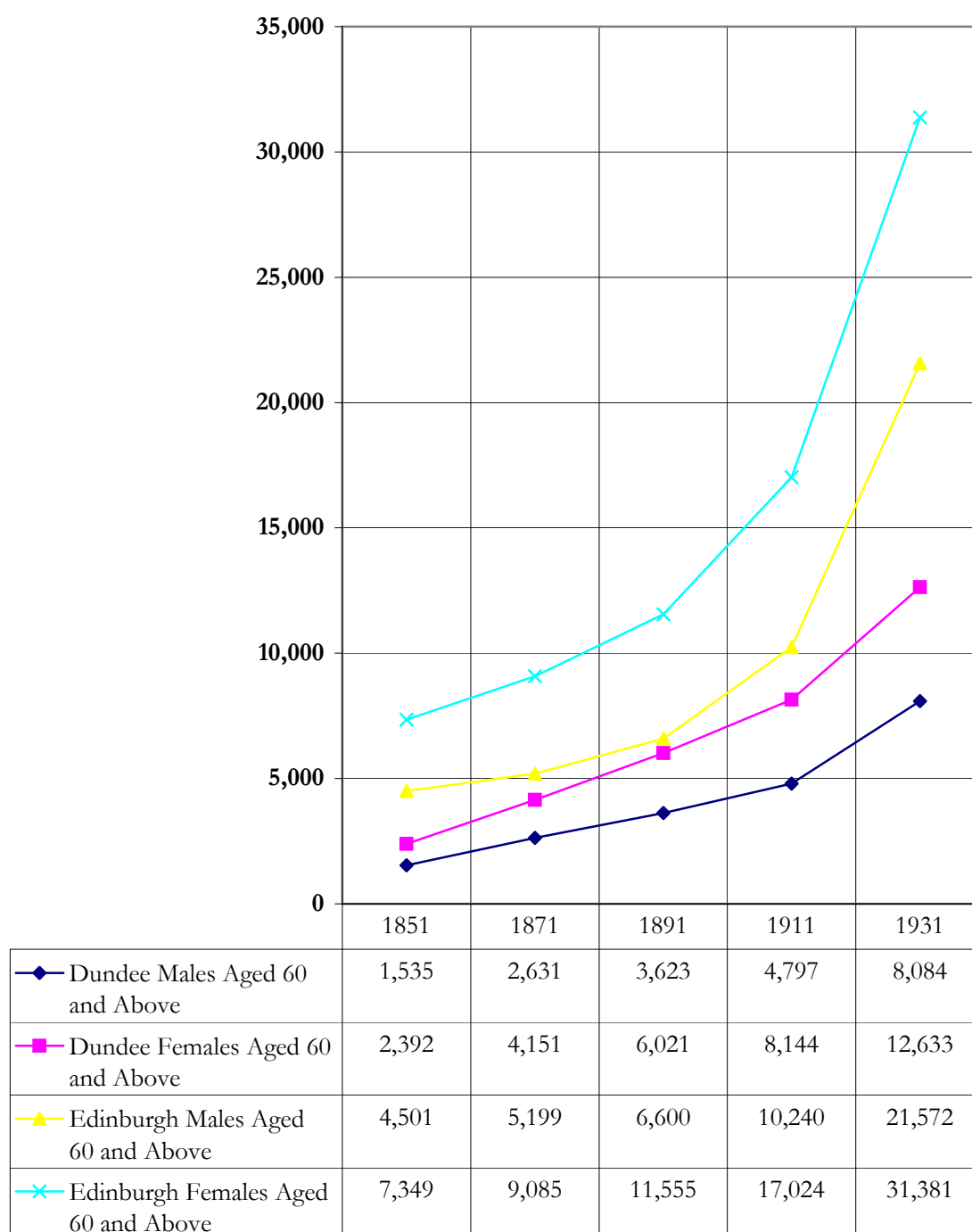
[Source: Personal calculations using BPP. *Census of Scotland, 1931*]

The concentration of older women in towns and cities is an indication of the upheaval of urbanisation. Given the economic and labour infrastructure of Scotland's cities, the proportion of females to males was markedly higher in Edinburgh and Dundee. This became more so over time. (See Table 1.9) Between 1871 and 1931, both urban areas experienced a disproportionately great increase amongst older women within the very old age brackets in comparison to national figures. In this period, male and female populations aged 70 and above in Scotland doubled; contrastingly, older population groups in both cities quadrupled. However, such growth merely widened the population gap in numerical terms. In 1871, there were 712 men and 1,369 women aged 70 and above in Dundee, and 2,508 men and 4,899 women respectively in 1931. In Edinburgh, there were 1,652 men and 3,436 women in 1871, and 6,822 men and 12,317 women in 1931 aged 70 and above.⁶² Thus, older female populations continued to outnumber their male counterparts. Such patterns were extensions of gender imbalances experienced over the life course, intensified in old age. One effect of such imbalances was the magnification of social and economic inequalities. When Poor Law Commissioners investigated the problem of poverty in old age, they observed that: 'The cases where pauperism is due clearly to misfortune are very much more frequent among women than men, partly owing to the unequal conditions under which they have often to compete in the labour market'.⁶³ In spite of contemporary political awareness of a concentration of poverty amongst larger numbers of older women, they were expected to rely upon themselves and their families in old age. Female-dominated networks in the community and the family were an outstanding feature of the social dynamics in Edinburgh and Dundee; hence, older people's roles and activities contradict *and* substantiate separate spheres ideology.

⁶² Data compiled from the 1871 and 1931 Scottish censuses.

⁶³ BPP. *Royal Commission on the Aged Poor, 1895* (1895), xvi/39.

Table 1.9: Population Change in Dundee and Edinburgh, by Gender at Twenty-Year Intervals, 1851-1931



[Source: Personal Calculations using BPP. *Census of Scotland*; 1851, 1871, 1891, 1911, and 1931]

Unlike marriage or widowhood, the experience of being a single person in old age has been under-researched; regrettably, older bachelors have been overlooked almost entirely. The limited scope of existing work ranges between feminist perspectives of spinsterhood to revisionist interpretations of the diverse arrangements single women made amongst themselves in old age.⁶⁴ One of the most useful of revisionist work is a biographical study of the Twining family in the late nineteenth century. An examination of familial roles found that Louisa Twining's aunt, Ann, after the death of her mother, became her father's companion and fulfilled many duties that her mother would have undertaken. Ann and her sister Mary spent their middle years living together, as neither had married. Interestingly, even though Ann was the senior by fifteen years, Mary was the head of the household.⁶⁵ Like that of the Twining sisters, women's histories and other published sources in the UK concerning spinsterhood in old age tend to be English and middle-class. Although this provides interesting material for comparative purposes, much of the documentation as English is not representative of the majority of Scots in the period. Furthermore, older biographers were rarely unmarried; therefore, the few Scottish biographies that report qualitative data in this aspect are singular in nature. The dearth of primary and secondary material concerning single older men dictates the almost exclusive treatment of the socio-economic relationships single older women formed with family members.

Particular roles and problems are associated with spinsters because single women outnumbered single men in old age so significantly. Indeed, older single women comprised a range of 15-24% per cent of all women at their age cohorts between 1851 and 1911. In contrast, fewer than an average 9% of older men were single. Numerically,

⁶⁴ B. Hill, *Women Alone: Spinsters in England 1660-1850* (2001); P. Jalland *Women, Marriage and Politics, 1860-1914* (1986); P. Thane, *Old Age in English History: Past Experiences, Present Issues* (2000); and D.R Green and A. Owens, "Gentlewomanly Capitalism? Spinsters, Widows, and Wealth Holding in England and Wales c. 1800-1860", *Economic History Review* 66 (2003).

⁶⁵ Botelho and Thane (eds.) *Women and Ageing*, pp.180, 167.

there were three times as many single older women than men in 1871, four times as many in 1891, and nearly five times as many in 1911 in both Edinburgh and Dundee.⁶⁶ It is a reflection of data such as this that older unmarried women had different life courses from older single men *and* older married women. Contemporary perceptions of the differentiation in status reinforce the idea that spinsters had a different experience of old age. Upon the announcement of the marriage of Fanny D[ouglas] to Major Moray, Mary Stewart Mackenzie of Edinburgh wrote that she was glad of this, as otherwise [Miss Douglas] would have been at a disadvantage after her father's death:

The reverses of fortune, when they happen to men, are the subject of constant declamation; people moralize over the prince dethroned, the minister disgraced, the bankrupt merchant and so forth...Yet women in the course of common life often experience a more thorough and sudden change of situation without its being thought a reverse at all. I defy any of these high & mighty instances to equal that of a daughter of a great house whom one day sinks into an old maid with a single footman.⁶⁷

In larger nineteenth-century families, at least one daughter did not marry. Whether this was a result of the diminishing choice in partner, parental interference, or indeed personal choice is debateable; singlehood must be understood as a socially constructed status resulting from both demographic change and social mores. Further to analyses of status, singlehood in old age can be examined from two areas of inquiry: firstly, with whom did older spinsters live; and, secondly, what social and economic capital was available to unmarried older women?

Housing arrangements in middle and old age were varied due to factors such as economic resources, the degree of overcrowding in the family home, and the propinquity of remaining living family members. The 1901 Dundee Census Enumerator's Report indicated a diverse range of households. Single women were the heads of households

⁶⁶ Personal calculations using BPP. *Census of Scotland*, 1851, 1871, 1891, and 1911. Urban figures are slightly higher than rural ones, Edinburgh dramatically so at 24% in 1871 and 23% in 1911.

⁶⁷ Seaforth Muniments: Personal Correspondence of Mary Stewart Mackenzie (30 October 1826) (NAS GD 46/15/33).

with other family members, relations of the head of household, boarders, and sole householders. Despite arguments to the contrary⁶⁸, many single women lived alone in old age. In 1851 and 1901, women aged fifty and above were the head of household in approximately sixteen per cent⁶⁹ of a controlled sample of households in Dundee. A significant proportion of these women were single. Such living arrangements were made possible by a combination of economic capital and family networks outwith the home. Michael Anderson succinctly argues this point in reference to his study of family structure in nineteenth-century Lancashire: 'Kinship does not stop at the front door. There are few functions which can be performed by a co-residing kinsman which he cannot perform equally well if he instead lives next door, or even up the street'.⁷⁰ Such practices are well-articulated in oral histories and contemporary biographies. The older unmarried aunt of the wife of John Inglis, an Edinburgh clerk, lived two houses away from them in the 1870s. Social contact and shared responsibilities between them were dutifully recorded in his journal on a daily basis.⁷¹ Older women in Dundee recall regular visits with great-aunts and other unmarried relations. One commented, 'It was two tram cars and a mile's walk from the Hilltown to Lochee where [great] Aunt Sarah stayed. But Mum insisted me an' my sister go every Saturday with nice things to eat. That was our responsibility'.⁷² These visits were made in the interwar period when most families like these were struggling financially. Obligations for older unmarried family members were often difficult to meet.

⁶⁸ Richard Wall argues: 'Living alone in old age was rarer, if not totally unknown in pre-industrial times. Indeed, in the middle of the nineteenth century the proportion of elderly on their own may have been even lower than in pre-industrial times'. R. Wall, "Relationships Between the Generations in British Families Past and Present", in C. Marsh and S. Arber (eds.), *Families and Households: Divisions and Change* (1992).

⁶⁹ Personal calculations from Census Enumerator's Reports, Dundee (1851 and 1901).

⁷⁰ M. Anderson, *Family Structure in Nineteenth-Century Lancashire* (1971), Pp. 56-57.

⁷¹ J. Inglis, *A Victorian Edinburgh Diary* (1984) See also A. Smith, *Women Remember: An Oral History* (1989); J. Faley, *Up Oor Close: Memories of Domestic Life in Glasgow Tenements, 1919-1945* (1990); Dundee City Council, *Learning Through Reminiscence*. (2002); and H. Clark and E. Carnegie, *She Was Aye Workin': Memories of Tenement Women in Edinburgh and Glasgow* (2003).

⁷² *Interview with Diana Wilke*, Dundee, (8 July 2004). Diana pointed out that it would not have been possible for her relation to stay in their tenement flat because there were eight in her family, and only two rooms.

Irrespective of class, very few single older women were in an economic position to solely support themselves in old age. Middle-class women were limited by what their families could provide for them, given that no more than three per cent of such older women worked outside the home before the twentieth century⁷³. Although working-class single women were typically employed well past middle age in the textile industry and domestic service, they were not paid adequately enough to save for their old age. Both extremes were problematic in the absence of family or economic resources. The Poor Law was often the only option for older women in such situations. The degree of poverty experienced by single older women is evident by the disproportionate number of unmarried claimants. For example, in the 1881 censuses of poorhouses in Edinburgh and Dundee, of the total female inhabitants aged sixty and above, more than one third were unmarried.⁷⁴ It must be considered that those women formed one-sixth (17%) of the total population in the poorhouses, whereas unmarried women aged sixty and above comprised no more than two percent out of the total population in Edinburgh and Dundee. Single older women in urban areas were thus dependent on strong familial ties.

The elaborate nature of such kinship networks was not limited to single older women. Based on marriage customs and practices during most of their adult lives, married men and women formed and retained unique relationships with their spouses in old age. Despite the individuated nature of marriage, analyses of such relationships must not rest solely on the minutiae of each marriage. Areas of discussion can be drawn from the complex patterns that have evolved from more traditional practices, further shaped by contemporary socio-economic imperatives.⁷⁵ A useful lens for interpreting marriage

⁷³ In 1891 the national figures read that 754 women aged 65 and above were employed in professional occupations, 52 in commerce, and 4,841 in domestic service- which was largely the domain of working-class women. This was out of a total 120,151 women aged 65 and above. BPP, *Census of Scotland 1891*.

⁷⁴ *Dundee Combination, Dundee East and West and St Cuthbert's and Edinburgh City (Craiglockhart) Poorhouse Registers, 1881* taken from <www.dundee.gov.uk> and <www.users.ox.ac.uk> (19 August 2002).

⁷⁵ For an understanding of the social evolution of marriage in industrialised societies, see R.B. Outhwaite (ed.), *Marriage and Society: Studies in the Social History of Marriage* (1981). T.C. Smout's article in particular

relationships is the incorporation of historical and anthropological methodologies. One of the most elegant of these is Jack Goody's study of the European family. Goody addresses the industrialisation and modernisation processes of the eighteenth and nineteenth centuries and their impact on family structure. He explains that the effect of the chaotic nature of urbanisation was a re-establishment of more stable communities, with an increasing tendency to marry within the neighbourhood, and the dominance of female-centered institutions of domesticity.⁷⁶ The latter forms the central theme for further analyses of the tendency for matrifocality in nineteenth-century kinship networks in Dundee and Edinburgh. The experience of marriage in urban Scotland was vulnerable to shifting mores and demographic pressures in the nineteenth and twentieth centuries. Therefore, it is constructive to ask in what manner marriage operated as a stabilising force for older people. It can be argued that men in particular experienced greater continuity between middle age and old age because a majority of older men were married, whereas female populations experienced more socio-economic transitions over the life course. Marriage and remarriage patterns provided older husbands with a distinctive socio-economic experience of growing older.

The concentration of married men in older cohorts is a reflection of gendered marriage practices and demographic patterns. In the period 1871-1911, 60-68% of men aged sixty and above in Edinburgh and Dundee were married. Although women were more numerous than men as a total population group, married older men significantly outnumbered married older women. (See Tables 1.10-1.13)

provides a longitudinal view of couple formation and marriage practices in Scotland, of which some of his minor arguments concerning socialised rationales for marriage, and the effect of mobility and class are worth exploring. T.C. Smout, "Scottish Marriage, Regular and Irregular, 1500-1940", in R.B. Outhwaite, *Marriage and Society* (1981).

⁷⁶ J. Goody, *The European Family* (2000), pp. 134-135. See also P. Laslett and R. Wall, *Household and Family in Past Time* (1972).

Table 1.10: Civil and Conjugal Condition in Dundee, 1871

Dundee	60-	65-	70-	75-	80-	85-	90+	Totals
<i>Males</i>								
Unmarried	91	72	31	12	6	7	2	202
Married	911	441	251	88	29	8	1	1729
Widowed	235	169	152	76	39	7	3	615
<i>Females</i>								
Unmarried	269	150	145	43	23	5	3	638
Married	609	266	174	39	12	4	0	1,104
Widowed	868	620	504	235	123	38	21	2,409

[Source: BPP, 1871 Census Scotland and Personal Calculations]

Table 1.11: Civil and Conjugal Condition in Edinburgh, 1871

Edinburgh	60-	65-	70-	75-	80-	85-	90+	Totals
<i>Males</i>								
Unmarried	273	170	117	67	14	3	1	645
Married	1,516	915	526	182	84	15	6	3,244
Widowed	397	292	287	199	89	34	12	1,310
<i>Females</i>								
Unmarried	820	552	436	226	111	30	11	2,186
Married	1,156	544	267	85	17	8	0	2,077
Widowed	1,462	1,205	1,139	597	288	96	35	4,822

[Source: BPP, 1871 Census Scotland and Personal Calculations]

Table 1.12: Civil and Conjugal Condition in Dundee, 1911

Dundee	60-	65-	70-	75-	80-	85-	90+	Totals
<i>Males</i>								
Unmarried	120	83	63	20	7	3	0	296
Married	1,399	896	513	176	46	13	2	3,045
Widowed	345	405	346	219	97	33	4	1,449
<i>Females</i>								
Unmarried	545	384	303	123	59	20	6	1,440
Married	1,068	712	376	94	42	3	0	2,295
Widowed	1,123	1,180	1,112	573	279	112	27	4,406

[Source: BPP, Census of Scotland, 1911 and Personal Calculations]

Table 1.13: Civil and Conjugal Condition in Edinburgh, 1911

Edinburgh	60-	65-	70-	75-	80-	85-	90+	Totals
<i>Males</i>								
Unmarried	462	264	175	90	25	9	2	1,027
Married	2,423	1,845	1,084	416	127	20	4	5,919
Widowed	732	770	659	402	196	65	13	2,837
<i>Females</i>								
Unmarried	1,308	1,002	821	466	219	78	39	3,933
Married	2,293	1,328	694	207	61	7	0	4,590
Widowed	2,127	2,247	1,961	1,231	633	243	54	8,496

[Source: BPP, Census of Scotland, 1911 and Personal Calculations]

A careful analysis of the conjugal condition of older people reveals that until the age of 85, the gap between older married men and women increased at each successive quinquennial period. These findings can be interpreted in terms of the higher death rates of men after the age of sixty, the consequence of which being more widows than wives. However, this does not explain the general trend of proportionately more men being married over the life course. Social factors such as remarriage practices provide some clues as to the disparity in conjugal status between older men and women. These differentials have been examined in recent studies of remarriages in nineteenth-century Sweden, where it was observed that differences between men and women in the number of remarriages can be explained by the way gender and social status interacted, which influenced the likelihood of getting married.⁷⁷ In Scotland, the number of widows' remarriages was significantly lower than those of widowers. Other than for demographic reasons, such as limitations resulting from the dearth of potential remarriage partner, most widows did not to remarry for social reasons. Men widowed in young and middle age were most likely to remarry, often selecting women many years their junior.⁷⁸ (See Table 1.14) By marrying women measurably younger than themselves, men formed distinctive marriage and family structures, which ultimately provided them with a wider selection of sources of companionship and care in old age. Indeed, most remarriages resulted in a second family.⁷⁹ David Johnston, a baker from Edinburgh, was the third child of his father's second marriage, born when Mr Johnston was in his sixty-second year.⁸⁰ It is significant that men who remarried in this manner retained the role and responsibilities of being a father considerably longer. Upon his death in his eighty-first

⁷⁷ C. Lundh, "Remarriages in Sweden in the Eighteenth and Nineteenth Centuries", *The History of the Family* 7 (2002)

⁷⁸ Joan Lindsay recalls her mother's experiences growing up in a turn-of-the-century household. Her mother's family structure was a typical example of the practice of widowed men remarrying younger women and forming two families. *Conversation with Joan Lindsay*, Glasgow, (23 December 2001).

⁷⁹ A review of Enumerator's Reports reveals large gaps in ages of children in such households. A second family is detectable because children in one stem family were listed by gender, eldest male first and youngest female last, whereas in a mixed family the second set of children is listed after the first.

⁸⁰ D. Johnston, *Autobiographical Reminiscences*.

year, Edward Baxter's (Baxter Brothers) two sons and three daughters by his third marriage were still comparatively young in years.⁸¹ Older men in such families were more likely to have emotionally or financially benefited from having single working-age children living in their homes. More to the point, older married men allude to their contentment with being cared for by their wives.⁸² To this effect, a Dundonian shopkeeper wrote in his memoirs: "There are some who enjoy that inestimable blessing...namely a good wife, and as a necessary consequence, a happy home'.⁸³ It would seem that men's kinship ties in old age were the result of their choices in marriage partner; in contrast, women's extended family networks demanded an investment of social exchange over the entire life course.

Table 1.14: Marriages of Widows and Spinsters With Widowers in Scotland, 1861-1870

Ages	Widowers	Spinsters	Widowers	Widows
21-25	382	3,068	30	88
25-30	2,521	4,976	288	638
30-35	3,627	4,082	657	1,160
35-40	3,732	3,171	986	1,427
40-45	3,241	1,872	1,199	1,324
45-50	2,343	922	1,101	919
50-55	1,574	311	875	474
55-60	1,014	121	565	204
60-65	665	30	391	89
65-70	286	3	171	15
70-75	103	1	73	4
75-80	41	1	11	2
80+	5	0	6	1
Totals	19,534	18,558	6,353	6,345

[Source: BPP, *Census of Scotland 1871*]

Given the excess in number of widowers over spinsters and widows, it can be concluded that a number of widowers married women (mostly spinsters) under the age of 21. Factoring this into an analysis of central tendency, the mean age of spinsters marrying widowers was in fact just barely the age of 25. Respectively, widowers marrying spinsters were slightly above the age of 40. The overall effect of this would be that there would have been an age gap of between ten and twenty years. It is worth pointing out that the majority of widows who remarried did so towards the end of their reproductive cycle.

⁸¹ W. Norrie (ed.), "Edward Baxter", in *Dundee Celebrities of the Nineteenth Century: Being a Series of Biographies of Distinguished or Noted Persons* (1873) p. 374.

⁸² Of all the biographical material consulted for this thesis, every older male autobiographer, and most biographies about Scottish men, fondly refer to their wives- often conveying an idealised moralistic tone.

⁸³ A.C Adams, *The History of a Village Shopkeeper: An Autobiography* (1876).

Illustration B: *Dr and Mrs Archibald With Their Children, Fife Scotland (1855)*



Source: ALB6-20, Photographs in Albums, University of St Andrews Library Photographic Archive

Most notable in this photograph is the age difference between the doctor and his wife. The image captures a young mother seated with her moderately older husband, a man in the prime of his professional and private life. This is an example of many marriages in the period in which early middle-aged men formed families with women between ten to twenty years younger than themselves. Such marriages were more likely to be entered into for practical reasons determined by social and economic imperatives, local population patterns and opportunity.

The stabilising effect of marriage in old age was limited by the experience of widowhood. The loss of a spouse profoundly affected the surviving partner and their family. Although social and economic problems associated with such circumstances varied on the basis of class and gender, it must be emphasised that psychological effects such as the grieving process itself were shared experiences. The death of a husband or wife was commonplace throughout the period of study; most older women and men in Scotland were widowed at least once in their lifetime. Widowhood in old age must therefore be understood as a social transition, and examined in terms of the social and economic adaptations demanded by such change. Because widows have normally been portrayed as passive or vulnerable in old age, European historians such as Sylvia Hahn have more recently challenged these assumptions by documenting the extent and range of strategies widows developed to reorganise their lives.⁸⁴ The basis of Hahn's arguments concerning the range of widows' participation is similarly addressed in recent British scholarship.⁸⁵ Pat Thane, for example, emphasises that widows in the modern period had greater opportunities for independent living within active family networks.⁸⁶ The feminised approach to these analyses necessitates a more inclusive approach to widowhood. Rather than emphasising widows' experiences in isolation, the demographic and social factors that differentiated the experience of widowhood for men and women must be addressed. Reflexively, analyses of the gendered experience of widowhood must be contextualised in terms of the shared experiences of loss and adaptation.

A review of Scottish biographies and journal entries written by older men and women in the nineteenth and twentieth centuries reveals that one of the most life-

⁸⁴ S. Hahn, "Women in Older Ages- 'Old' Women?", *The History of the Family* 7 (2002).

⁸⁵ Peter Marris' dated scholarship is nonetheless an important historical work integrating many of the contemporary stereotypes *as well as* functional analyses of older widows' use of their families as socio-economic resources in the past. P. Marris, *Widows and Their Families* (1958).

⁸⁶ Thane, *Old Age in English History*, Ch. 21.

altering events was the loss of a husband or wife. With only a few exceptions⁸⁷, bereavement and the experiences of widowhood are well-documented. Some of the most expressive examples are those written by sons about their fathers' loss. The sociologist Patrick Geddes recalled: "The old soldier of ninety-one felt little left to live for since the death of [his wife]....This was more than he could face alone; in his last moments he appealed [to his best-loved son]. "Oh will I see her Pat?" And I lied, lied to him for the first time. "Yes, oh surely yes." Then he passed away'.⁸⁸ Emotional responses to widowhood were typically accompanied by references to long-term health-related effects. Older men and women reported experiences such as premature ageing, sleeplessness, and acute physical pain. The youngest son of twelve, George Gilfillan noted that a month after his mother was widowed, her hair became grey and she looked ten years older.⁸⁹ Psychological effects thus significantly impacted physical responses to loss. The 'close companion of his solitude', Peter Carmichael's neuralgic pains caused him 'sleepless nights which wore out the nervous energy, destroying enjoyment and rendering duty a weariness. I have been lying awake a good deal lately, partly with pain and a good deal with thick-coming fancies and shrinking from anticipated evils'.⁹⁰ Numerous expressions of grief often dominated narratives concerning the experiences of growing older, principally those of widowed men. The emotional disequilibrium resulting from widowhood was exaggerated by demographic and social differentials.

Variables such as timing in the life course and the duration of widowed status can be understood as inevitable extensions of class and gender divisions in old age. Between 1851 and 1931, the life expectancy of men was considerably lower than that of women in their same cohort. In a review of quinquennial age groups over the period, it is quite

⁸⁷ The twentieth-century suffragist Frances Balfour barely acknowledged the loss of her husband in her two-volumed autobiography. F. Balfour, *Ne Obliviscaris* (1930).

⁸⁸ Quoted in P. Mairet, *Pioneer of Sociology: the Life and Letters of Patrick Geddes* (1957), p. 97.

⁸⁹ R. Watson and E.S. Watson, *George Gilfillan: Letters and Journals, with Memoir* (1892), p. 11.

⁹⁰ P. Carmichael, *Reminiscences Vol. 3*. (c. 1890), p.185, (UDA MS102/1/1-3). Also, M. Somerville, *Personal Reflections: From Early Life to Old Age, of Mary Somerville* (1873).

clear that until the interwar period, the average male did not live much past his sixtieth year, whereas a greater proportion of women lived more than a decade longer. (See Tables 1.15- 1.17) Analyses of longevity and class indicate that middle-class males significantly outlived their working-class counterparts.⁹¹ In working-class cities such as Dundee, this would have significantly impacted a large proportion of surviving widows. The early onset of widowhood affected women for the long term as well as the short term. While younger widows left with dependent children were most likely to remarry, widows past childbearing years were the least likely to do so. Consequently, the prolonged experience of widowed status often resulted in the merging of middle age with old age. This is most apparent in census enumerators' reports.⁹² In Edinburgh and Dundee, widows in their middle years formed households of which they were often the head. In certain working-class neighbourhoods, such as the Overgate and the Hilltown in Dundee and the Canongate and Cowgate in Edinburgh, a majority of widows' households included family members and at least one lodger. Contrastingly, in the absence of local kin, widowers and older bachelors were often listed as boarders in these households.⁹³ Such arrangements provided widows with a particular status and specific responsibilities for the remainder of their lives. For example, Janet Bathgate, widowed in her thirties, ran a household in Edinburgh with her unmarried brother Robert, cared for her nieces, and held sewing classes for neighbours' children. The accumulation of fees from her scholars over the years allowed her an unusual degree of independence.⁹⁴ Thus, widows were expected to cope. For the most part, widows adapted and actively provided for themselves over extended periods of time.

⁹¹ An analysis of the relationship between employment and longevity is largely based on biographical material, which indicates that of those males who lived past their 60th year, a majority were ministers, and the rest were for the most part lawyers, judges, gentlemen, professors, engineers, officers in the military, or industrialists. Many of these men lived into their eightieth year. For further analysis of employment and old age, see the second section of this thesis.

⁹² Census Enumerator Reports for Dundee and Edinburgh, 1851 and 1901.

⁹³ See Dr Littlejohn's studies of housing arrangements and conditions in poor neighbourhoods in Edinburgh c. 1861. H.D. Littlejohn, *Report on the Sanitary Condition of the City of Edinburgh* (1866).

⁹⁴ J. Bathgate, *Aunt Janet's Legacy to Her Nieces* (1898).

Table 1.15: Ages of Older People in Quinquennial Periods, Scottish and County Figures, 1851

Census Data	50+	55+	60+	65+	70+	75+	80+	85+	90+	95+
Scotland										
Male	53,572	36,489	33,317	22,043	17,525	9,915	5,689	1,880	525	154
Female	65,029	44,352	44,734	29,241	24,043	13,664	8,770	3,045	951	320
Totals	118,601	80,841	78,051	51,284	41,568	23,579	14,459	4,925	1,476	474
Edinburgh										
Male	4,580	3,089	2,594	1,702	1,210	590	278	73	18	4
Female	6,307	4,226	3,835	2,564	1,803	971	509	166	49	10
Totals	10,887	7,315	6,429	4,266	3,013	1,561	787	239	67	14
Forfar										
Male	3,676	2,334	2,127	1,391	992	560	289	109	22	5
Female	4,570	2,981	2,823	1,924	1,476	794	489	156	37	7
Totals	8,246	5,315	4,950	3,315	2,468	1,354	778	265	59	12

[Source: 1851 Census of Scotland]

Table 1.16: Ages of Older People in Quinquennial Periods, Scottish and County Figures, 1901

Census Data	50+	55+	60+	65+	70+	75+	80+	85+	90+	95+
Scotland										
Male	83,679	65,608	55,564	36,978	26,312	14,760	7,263	2,213	484	101
Female	92,842	77,154	70,045	49,805	37,827	22,499	12,618	4,224	1,100	273
Totals	176,521	142,762	125,609	86,783	64,139	37,259	19,881	6,437	1,584	374
Edinburgh										
Male	7,946	6,102	4,992	3,081	1,817	1,067	466	113	31	5
Female	9,775	7,870	6,898	4,720	3,342	1,945	1,064	312	73	14
Totals	17,721	13,972	11,890	7,801	5,159	3,012	1,530	425	104	19
Forfar										
Male	4,082	3,244	2,951	1,922	1,313	737	316	100	21	3
Female	5,972	5,010	4,580	3,027	2,359	1,399	682	230	53	8
Totals	10,054	8,254	7,531	4,949	3,672	2,136	998	330	74	11

[Source: 1901 Census of Scotland]

It is observable that after the age of 80, women outnumbered men by a 3:1 ratio. Notably, from the age of 75 widows outnumbered widowers by 3:1.

Table 1.17: Ages of Older People, in Quinquennial Periods, Scottish and Principal Town Figures, 1931

Location/ Gender	Totals at All Ages	60-	65-	70-	75-	80-	85+
<i>Scotland</i>							
Males	2,325,523	91,681	68,115	46,006	24,546	9,775	3,516
Females	2,517,457	100,090	80,693	60,179	35,691	16,705	8,018
<i>Dundee</i>							
Males	78,793	3,206	2,370	1,417	730	271	90
Females	96,792	4,359	3,375	2,524	1,473	621	281
<i>Aberdeen</i>							
Males	76,861	2,941	2,192	1,414	719	323	98
Females	90,397	3,723	2,993	2,123	1,304	649	288
<i>Glasgow</i>							
Males	524,475	19,596	13,184	7,915	3,726	1,271	371
Females	563,986	19,563	14,815	10,433	5,642	2,258	965
<i>Edinburgh</i>							
Males	199,350	8,705	6,045	3,816	2,024	737	245
Females	239,660	10,577	8,487	6,132	3,625	1,732	828

[Source BPP, *Census of Scotland, 1931*]

The social environment shaped the complex nature of gender relations and family relationships in Scotland between 1845 and 1945. Families in urban areas distinctively retained conservative characteristics as an adaptive response to the far-reaching effects of migration, urbanisation, and demographic patterns. The preponderance of female populations in Edinburgh and Dundee markedly extended traditional family structures with the emergence of matrifocal kinship networks; the effect of employment and conjugal patterns, variations of matrifocality were most typical in Dundee. Within female-centred family organisations, women played supplementary roles as carers and fictive kin. A reflection of their predominance in the domestic sphere, women operated for the most part as the infrastructure that held extended families together. The diversity of their roles and responsibilities is an indication of the imperatives of forming and retaining caring relationships within the family and the community. Older women's status was thus determined by their involvement with their families over the life course. The feminine attributes of family structure raises important questions about the roles older men played. Certainly, the older male householder was a

feature of many families, and married people adhered to cultural conventions concerning husbands' and wives' obligations. Indeed, it can be argued that while most husbands were expected to provide for their families with economic capital, wives maintained family networks in the interest of building social capital. Such practices were invaluable, because the family operated as the primary socio-economic resource for older people.

**OLDER PEOPLE IN SCOTLAND, c. 1845-1945:
SOCIO-ECONOMIC CAPITAL AND THE FAMILY
(1.3)**

The long-term effects of industrialisation and modernisation during the nineteenth and early twentieth centuries dramatically impacted the structures and practices of Scottish kinship networks. In the early modern period, economic resources and caring responsibilities for older family members were shared within the extended family⁹⁵. However, as a consequence of the upheaval of mass migration from rural to urban areas in the nineteenth century, more elaborate family formations incorporating non-kin became predominant. By 1900, kith⁹⁶ and kin relationships formed the basis of social and economic capital for a majority of older age cohorts. Elaborate networks were maintained as a response to the prolongation of volatile economic cycles and severe deprivation resulting from the outcome of economic decline, trade depression, and two world wars. Scottish families characteristically adapted to economic and social pressures outwith and within the kinship network. Critics of policies designed to ameliorate poverty in old age notably overlooked common practices of the majority of families. Worryingly, dogmatic views⁹⁷ bemoaning the decline of the traditional family have been recycled by historians in more recent times.⁹⁸ This raises important questions concerning the viability of the family as a social and economic resource, which can be explored in

⁹⁵ Kinship definitions: Nuclear family--parents and children; Stem family--all direct ancestors and descendants; Extended family--nuclear and stem family plus assortment of other kin such as uncles/aunts, nephews/nieces and cousins. Taken from <www.entomology.ucdavis.edu> 17 December 2004. Recent scholarship indicates that Lowland kingroups and Highland clans in Scotland had complex networks based on blood relations and to a certain extent, fictive kin; thus socio-economic capital was shared within extended families in the pre-industrial period. See S. Murdoch, *Network North* (2005).

⁹⁶ Kith denotes a person's acquaintances, neighbours, and kinfolk. Chambers, *Concise Scots Dictionary* (1997), p. 344.

⁹⁷ Some of the most opinionated of these include the Reverend Thomas Chalmers, secretary of the Charity Organisation Society (COS) C.S. Loch, Poor Law authority Malcolm McNeill, and social historian Helen Bosanquet.

⁹⁸ D. Thomson, "The Decline of Social Welfare: Falling State Support for the Elderly Since Early Victorian Times", *Ageing and Society* 4 (1984).

several ways. Firstly, how did cultural norms and the radicalising effects of the modern period determine the manner in which Scottish families continued to provide for older family members over time; and, secondly, to what extent did kinship networks meet the needs of individual family members, the family as a whole, and those of society in general? The economic arrangements and social infrastructure maintained in intergenerational kinship networks provided older people with the means to remain interdependent and involved in their families and communities.

Over the past three decades, there has been a growing trend for academics to utilise interdisciplinary approaches in their research. Most scholarship concerning older people and their families incorporates historical, anthropological, and sociological methodologies. The terminologies sociologists employ to describe complex family relationships are particularly useful. Therefore, in the interest of simplifying the analyses of the family as a source of socio-economic capital, some of the vocabulary will be applied. These can be understood in terms of capital and practice. The concept of social capital has been applied to participation and integration in the family, encompassing a wide range of social relationships and roles fulfilled by older people.⁹⁹ Simply put, people forge links within their families and local communities to retain access to social and economic resources in old age. Quite appropriately, a social convoy has been used as a metaphor to describe social capital. ‘An individual moves through the life cycle surrounded by a set of people to who[m] he or she is related by the giving and receiving of social support’.¹⁰⁰ The extent of such support is bound by the social and economic limits existing within the family culture¹⁰¹. Family members form kinship networks in which specific practices bring mutual benefit to older and younger generations.

⁹⁹ T. Scharf *et al*, “Social Exclusion and Older People” ESRC (2000).

¹⁰⁰ R.L. Kahn and T.C. Antonucci, “Convoys Over the Life Course: Attachment Roles and Social Support”, in P.B. Baltes and O.G. Brim (eds) *Lifespan Development and Behaviour* (1980), p. 269.

¹⁰¹ Pierre Bourdieu describes this aspect of social reproduction in terms of fixed potentialities. P. Bourdieu, *Algeria 1960* (1979), p. 53.

Foremost of these practices is intergenerational exchange, a mechanism in which interactions and resources are transferred between multiple generations of the same family. Family members are guided by an implicit social contract that ensures long-term reciprocity¹⁰². The aim of intergenerational exchange is interdependency, a social structure which bridges the dichotomy between independence and dependence. An interdependent lifestyle across the life course is perceived as more advantageous on the strength of the cultural ideal of independence.

Late nineteenth-century British rhetoric concerning autonomy and the family was overwhelmingly classist in nature. Superficially, societal expectations of the socio-economic role of the family were in keeping with cultural traditions of family practice; the common view was that families should be self-reliant. A late nineteenth-century analysis of the Scottish family confirms such expectations. ‘The tie of consanguinity is not easily broken in Scotland. A cousin, with that people, must be a good many times removed before he be allowed to slide into the ocean which is considered common to humanity’.¹⁰³ However, traditional paternalistic understandings of the family were reinterpreted on the basis of *laissez-faire*¹⁰⁴ ideology. Bourgeois ideologues were most prolific in this regard. Taken from a wide selection of public documents and publications¹⁰⁵, Helen Bosanquet’s observation is an exemplar: ‘The family is an institution with an inveterate power of reasserting itself in the absence of unwise interference. It is beyond doubt that the majority of the aged have their independence

¹⁰² M. Silverstein *et al*, “Reciprocity in Parent-Child Relations Over the Adult Life Course”, *The Journals of Gerontology Series B: Psychological Sciences and Social Sciences* 57 (2002).

¹⁰³ Johnston, *Autobiographical Reminiscences*.

¹⁰⁴ Laissez faire or economic liberalism shares with political liberalism the idea that governments should have limited power and that the individual should have maximum freedom within a framework of law. Laissez faire, however, opposes any redistribution of wealth by the government, and therefore gives a distinct advantage to middle and upper-class people who are wealthy.

¹⁰⁵ It is no exaggeration to state that literally thousands of sources from the nineteenth and early twentieth centuries similarly convey *ad nauseam* the pre-eminent role of the family. A few include: BPP. Old Age Pensions Committee. *Departmental Committee and Other Reports on Old Age Pensions and the Deserving Poor, 1898-1900*; T. Chalmers, *Christian and Civic Economy*, vol. 2. (1823); Charity Organisation Society. *The Case Against Old Age Pension Schemes: A Collection of Short Papers* (1903); C.S. Loch, *Old Age Pensions and Pauperism. An Inquiry* (1892); and R.P Lamond, *The Scottish Poor Laws: Their History, Policy, and Operation* (1892).

assured by membership of a family group'.¹⁰⁶ Such words are heavily laden with naïve idealism, and most troublingly, with divisive implications that working-class families were not equal to the task of taking care of their own family members. The emphasis on the institution of the family as a socio-economic resource was a moralistic position often taken by government officials to the extreme. Poor Law authorities asserted that on occasion they had to press children to assume responsibility for their parents. Malcolm McNeill testified: "It does take a little coaxing to get [the poorer working classes] to take their parents into their houses; it has been tried to use the poorhouse as a *compulsitur*, [which] I believe has been successful".¹⁰⁷ It must be emphasised that for the most part, Poor Law supervisors had very few dealings with the majority of older people and families who did not seek relief. Consequently, Supervision Reports tend to convey unrealistic expectations concerning the maintenance of older family members. Patronising representations of family life failed to address typical familial practices. Perhaps not surprisingly, the repetitious condemnation of a minority of families has influenced academic thought throughout the twentieth century.

The perpetuation of middle-class prejudices has formed the basis for academics' overemphasis of the neglect of older people in the late nineteenth century. The firm belief that poorer working-class families fulfilled their obligations to older family members owing to compulsion dominates much of the literature. Writing during the interwar period, the historian Alexander Cormack articulated contemporary beliefs concerning the role of the family as a source of relief. Cormack commented: 'Children should be compelled to provide for their indigent parents... One wonders how far this mass of social legislation is dulling the human instinct of independence.'¹⁰⁸ Such over-generalisations concerning familial neglect have been perpetuated in modern scholarship.

¹⁰⁶ H. Bosanquet, *The Family* (1906), pp. 220, 224.

¹⁰⁷ BPP, *Royal Commission on the Aged Poor* (1895), Qs. 9, 747-8.

¹⁰⁸ A.A. Cormack, *Poor Relief in Scotland. An Outline of the Growth and Administration of the Poor Laws in Scotland, From the Middle Ages to the Present Day* (1923), pp. 130, 196.

The social historian David Thomson contended that by 1870, it was assumed that the community at large as well as the state were responsible for the elderly, as it was ‘Un-English behaviour to expect children to support parents’.¹⁰⁹ Similarly, feminist historians have recycled nineteenth-century arguments about the Poor Law and the aged poor. Leonore Davidoff *et al*, overstate the factor of the poorhouse as a deterrent. ‘The very real fear which the elderly had of the Poor Law institutions, the only other alternative to the charity of voluntary-run Home until 1947, did not diminish and they remained determined to avoid residential care at all costs’.¹¹⁰ The poorhouse has cast a long shadow across historical interpretations of the institution of the family. Pat Thane has astutely observed that the conviction that younger people neglected their older relatives has survived tenaciously, despite assertions to the contrary.¹¹¹ It can be argued that the persistence of such convictions has merely reinforced differentials between middle-class and working-class families.

The experience of class over the life course figured into the accumulation of socio-economic capital within family networks. The emergence of the middle class in the nineteenth century introduced an additional social stratum in which a growing number of older people had social and economic capital at their disposal. Paul Johnson has interpreted how class effected a widening chasm within older age cohorts. Examining late nineteenth and early twentieth-century material, Johnson found: ‘The real distinction was that whereas middle-class people could accumulate sufficient capital to keep themselves in old age by *ad hoc* saving during their lifetimes, workers could not’.¹¹² In the absence of adequate economic capital in the majority of families in the period, social capital

¹⁰⁹ D. Thomson, ‘The Welfare of the Elderly in the Past: A Family of Community Responsibility?’, in Pelling, M. and Smith, R. (eds.) *Life, Death and the Elderly: Historical Perspectives* (1991), p. 198.

¹¹⁰ L. Davidoff, M. Doolittle, J. Fink and K. Holden, *The Family Story: Blood, Contract and Intimacy 1830-1960* (1999), p. 213. See also D. Englander, *Poverty and Poor Law Reform in Britain: From Chadwick to Booth, 1834-1914* (1998).

¹¹¹ Thane, *Old Age in English History*, p 407.

¹¹² P. Johnson, *Saving and Spending: The Working-Class Economy in Britain 1870-1939* (1985), p.83.

remained paramount as a resource in old age. The culturally-embedded practices of kinship networking and intergenerational exchange were observed by the nineteenth-century social reformer Octavia Hill: 'They feel that if they invest their money in other forms it brings in a better and happier return. They prefer educating their children well, and getting them in better positions; or buying a small business, or having a little house, or getting a quantity of furniture, or something which they have, and have to leave, and to give, and to use'.¹¹³ The importance of social capital is evident in biographical material; relationships with family members are emphasised in working-class accounts. For many older people in the working class, the loss of younger family members proved to be problematic.

In his study of intergenerational relationships in Great Britain, Richard Wall raises important questions concerning the major problems older people faced when co-residence with their families was not possible. Firstly, older individuals who did not have other members of the household to whom they could turn when they fell sick were more likely to suffer in such circumstances; secondly, it was unlikely that older people who lived on their own would receive from relatives financial assistance of an equivalent value to that derived from relatives who co-resided; thirdly, aid in kind as opposed to cash transfers was inherently difficult when relations lived further away. Wall concludes his analysis with the point that irrespective of whether older people lived with their families or not, considerations must be made in terms of how capable children were as regards providing for elderly parents.¹¹⁴ The latter point is most significant; many families were not in a position to provide older relatives with financial resources. The MP George Barnes observed the limitations of the family as a resource in old age: 'I overtook a woman who hoped to find asylum in the home of a married daughter. I knew the

¹¹³ BPP, *Royal Commission on the Aged Poor* (1895), Question 10,464.

¹¹⁴ R. Wall, "Relationships Between the Generations in British Families Past and Present", in C. Marsh and S. Arber (eds) *Families and Households: Divisions and Change* (1992), pp. 63-4.

mingled feelings with which the poor wanderer would be hailed, because of the deepened poverty consequent on another mouth to fill'.¹¹⁵ Economic and social inequalities in old age were often resolved by means of alternative adaptive strategies, which allowed older people to remain in their communities.

Because class differentials predetermined access to particular economic resources, social networks enabled people to remain relatively autonomous in old age. Thus, older people sought alternate sources of care within and outwith the family. Some of the most important social resources older people had access to were fictive kin networks. For many urban working-class people who did not have kin at their disposal, neighbours in tenements functioned to a certain extent as an extended family. In an oral history project conducted in the 1980s by the Dundee Art Galleries and Museums, a number of women reported that they formed reciprocal relationships with older people in their housing block. A migrant from Ireland, Mary O'Donnell recalled: 'When I lived in Peddie Street...there was this old, older couple lived upstairs. They didn't have any family themselves but they were awful awful kind, very nice couple they were'.¹¹⁶ Because Mary's husband was working away from home in the Seafield colliery for two to three weeks at a time, when she wanted to go out her only alternative was to leave her children with her older neighbours. Her scanty reference to reciprocation suggests that such exchanges were presumed to be the norm within fictive kin networks.¹¹⁷ Poorer older people without kin often elected to share a house and pool their resources with others in similar socio-economic situations. A survey of field notes taken by council Poor Law

¹¹⁵ G. Barnes, *From Workshop to War Cabinet* (1924), pp. 65-66.

¹¹⁶ J. Murray and D. Stockdale (eds) *The Miles Tae Dundee: Stories of a City and its People* (1990), p. 15. Similar recollections of fictive kin arrangements in tenements are documented in CSV Community History Project and Silverlea Day Care Unit, "Hard Graft", in *A Patchwork of Memories* (1996); Clark, and Carnegie, *She Was Aye Workin'*; Dundee City Council, *Learning Through Reminiscence*; J. Faley, *Up Oor Close*; Living Memory Association, *Edinburgh Lives: People's Memories in Their Own Words* (1999); Prestonfield Remembers Group, *Changed Days: More Stories and Reminiscences*. (1985); and A. Smith, *Women Remember*.

¹¹⁷ It cannot be presumed that neighbourliness was the norm. Indeed, the adage that 'good neighbours keep themselves to themselves' has frequently emerged in oral histories conducted for this thesis as well as in Elizabeth Robert's text, *A Woman's Place: An Oral History of Working-Class Women, 1890-1940* (1984).

investigators in Edinburgh and Dundee suggests that this practice was quite common. For example, in a 1921 register, five out of thirty-nine households had late middle-aged and elderly householders, of which three had non-family members listed. One of these was a household containing three elderly women. The eldest was described as an OAP, another as disabled, and the last as a widow; none of these women shared the same name. The investigator commented: '[They are] respectable [and they] spend a lot of time with each other'.¹¹⁸ In contrast to such arrangements, wealthier individuals in old age paid for the services of formal carers, who often served as substitute family members. A childless widower, the nineteenth-century architect Rowand Anderson received frequent visits from his friend and medical adviser, Dr Scotland of Colington, and shared his home in Edinburgh with a full-time nurse in the final years of his life.¹¹⁹ An examination of the range of sources of socio-economic capital reveals how important 'family' relationships were to older people; caring relationships and residency patterns markedly mirrored traditional family structures.

Studies of the family in early and late modern Scotland reveal that families conventionally undertook economic arrangements to assure a source of income and care in old age. The transfer of capital and status to adult children in return for resources such as housing comprised a particular form of intergenerational exchange based on traditional practices of paternalism and primogeniture. In his study of family and noble society in the early modern period, the historian Keith Brown suggests that the most important relationship in any noble family was that between a father and his eldest heir. Old and sick lords passed on their responsibilities and property to their eldest sons, to then draw a pension from the family's income. For instance, in 1577 the chronically ill and elderly third lord Elphinstone made over all his lands to his eldest son. With income

¹¹⁸ W.M. Duncan, *Dundee Parish Council Investigator Field Notes* (September/October 1921) (UDA MS/37/1).

¹¹⁹ S. McKinsty, *Rowand Anderson: "The Premier Architect of Scotland"* (1991), p. 177.

from the estate, Elphinstone became a tenant for the remainder of his life.¹²⁰ Financial arrangements made on behalf of widows were similarly bound with inheritance. Eldest sons inherited outright or in trust their father's private estate, whereas widows were entitled to incomes from their husband's commercial enterprises.¹²¹ Thus, women in the merchant class were formally provided for in their old age. Such practices reinforced family ties and protected property ownership. Economic arrangements amongst the landed and merchant classes in the early modern period set a precedent for the allocation of resources within the family in the nineteenth century. The distribution of wealth within the middle-class family as well as long-term investment practices have been interpreted in terms of the property cycle. Male investors timed their form of investment in relation to different imperatives throughout the life course, switching from higher-risk investments in business capital in middle age to more steady investments in property that produced a rentier income.¹²² Successful investors accumulated wealth for their families and sufficient economic provision for old age.

In the nineteenth and twentieth centuries families entered into mutually beneficial financial arrangements, often based on a mixed economy of capital and caring relationships. Legal documents and biographical material from Edinburgh and Dundee specifically demonstrate methods of assuring financial stability in old age. Two of the most common of these were transfers and bequests. Typically, in mid to late middle age, businessmen transferred interest in their businesses to younger male family members, thus providing their dependents and themselves with a source of income in old age. In a strong business culture, most arrangements were specific to the industry and the needs of

¹²⁰ K.M. Brown, *Noble Society in Scotland: Wealth, Family and Culture From Reformation to Revolution* (2000), Pp. 166-7 and 36.

¹²¹ E. Ewan, "Alison Rough: Edinburgh Through the Lens of a Sixteenth-Century Life", *Writing Biography: Comparative Perspectives*, Scottish Women's History Network Conference (25 May 2002). In the instance of Alison Rough, she was the principal owner of her husband's businesses in her widowhood.

¹²² R.J. Morris, "The Middle Class and the Property Cycle during the Industrial Revolution", in T.C. Smout (ed.), *The Search For Wealth and Stability: Essays in Economic and Social History* (1979), pp 108-110.

the family. In the 1860s, John Inglis's Edinburgh cousins took over their grandfather's grocery trade in the Tolcross. The senior John Inglis retained a share in the business to provide for his wife and himself for the remainder of their lives.¹²³ Over several generations, the directors of McEwan's and Youngers breweries drew up quite elaborate transfers to sons, grandsons, and nephews to release capital and keep the family interest in the business.¹²⁴ Only under exceptional circumstances did family members refuse to take over the family business. James Chalmers, the inventor of the adhesive postage stamp, was distressed by his sons' lack of interest in the bookselling and book binding business he had inherited from his father. His concern for the fate of loyal employees and the care for his wife was strongly expressed in his will. 'I very much regret that none of my sons are likely to follow my line of business, chiefly on account of the females of my family.'¹²⁵ Chalmers' will is quite typical in that he clearly stipulated how his estate was to be divided in the interest of providing for his wife in her old age.

Wills provide important insights as to the financial condition of particular families, as well as the intentions of the deceased concerning surviving family members.¹²⁶ A review of a selection of nineteenth-century testamentary documentation reveals two important functions of a will. Firstly, married people (usually men) went to great lengths to assure that their surviving partners were financially secure. Some husbands were quite specific in their instructions, which often included conditions that provided their wives with housing, material resources, and an income. Most interestingly, bequests were written in such a way that at least one surviving child (typically a daughter)

¹²³ J. Inglis, *A Victorian Edinburgh Diary* (1984) Introduction.

¹²⁴ William McEwan & Co Ltd. Private Minutes 1918-1959 (UGA SNM 1/6/2/1) and D. Keir, *The Younger Centuries: The Story of William Younger & Co. Ltd 1749-1949* (1951).

¹²⁵ Testament of James Chalmers (1853) (NAS SC45/31/11). His biography reveals that Chalmers was a workaholic, to the extent he had very little to do with his family, and remained in work until his death at the age of seventy-one. It is not surprising that his three daughters-in-law did not acquiesce to the transference of his business to his remaining three sons. W.J. Smith (ed.), *James Chalmers, Inventor of the Adhesive Postage Stamp* (1970).

¹²⁶ The relationship of testaments to arrangements in old age was brought to my attention by R.J. Morris at a seminar held in the School of History at the University of St Andrews, (21 November 2002).

was asked to care for their mothers in old age. Reverend Thomas Guthrie's will is a good illustration of the deliberate arrangements executed on behalf of widows and surviving children. Sprawling over twenty-four pages, the majority of Guthrie's numerous instructions concerned his wife. The most pertinent of these include:

In the event of my said wife surviving me I appoint my Trustees to set apart and invest such a sum as together with the provision to her under the Deed of Trust for behoof of myself And her and our family After referred to, will yield To her a free yearly Income of Three hundred and twenty Pounds Sterling to pay the Same to her during her Life... But it is hereby further declared that the said free yearly Income of Three hundred and twenty pounds shall not be inclusive of, but over and above the sum which will be payable annually on my death to my said Spouse from the Widows Fund of the Church of Scotland; And I also direct my Trustees to make payment Within one month after the day of my death to my said wife, if she survive me of the sum of one hundred pounds Sterling as an allowance to her for mournings; ... and I also appoint my Trustees to allow my said spouse, if she survive me, free of any charge for rent, the use and possession of my house, Garden and [contents] in Salisbury Road, Edinburgh during her lifetime...¹²⁷

The Guthries' youngest unmarried daughter Clementina was similarly provided for, with specific reference to her father's expectations from her. 'To my daughter Clementina a free yearly income of One hundred pounds per annum ... which annual sum of one hundred pounds I direct to be given to her as including Seventy pounds for her maintenance and Thirty pounds in consideration of her dutiful attention [to her mother]¹²⁸ Secondly, the use of the will to bequeath monetary and material rewards to carers was quite common. In the instance when men were predeceased by their wives, older widowers were cared for by younger family members or paid carers. Such duties were rewarded accordingly, which often provided women with a sum of money that could be reserved for their old age. Thomas Carlyle provided for his niece in 1881 in this manner. '...to my niece Mary Carlyle Aitken to whom dear little soul I bequeath

¹²⁷ *Testament of Thomas Guthrie* (1873) (NAS SC70/4/144).

¹²⁸ *Testament of Thomas Guthrie*. The importance of planning for old age was a firm belief of Guthrie's- as a young minister he implemented savings banks for his parishioners. D. K. Guthrie and C.J. Guthrie, *Autobiography of Thomas Guthrie D.D. and Memoir by his Sons* vol. 1 (1874).

Five hundred pounds for the loving care and unwearied patience and helpfulness she has shown to me in these my last solitary and infirm years'.¹²⁹ Carlyle's relationship with his niece was clearly a close one, because he also left her the majority of Jane Welsh Carlyle's personal effects, including: 'whatever Memorials of my Dear Departed One she has seen me silently preserving here, especially the table in the Drawing Room at which I now write and the little child's chair (in the China Closet)'¹³⁰ Bequests and transfers provided middle and upper-class families with the power to institute legally binding formal arrangements for old age.

The socio-economic arrangements working-class families made amongst themselves for old age are comparatively difficult to quantify because social exchange and reciprocal transfers of goods and services were not widely documented. Excepting Charles Booth's meticulous work investigating the aged poor in England and Wales¹³¹, very few systematic studies of older people and their families in the nineteenth century exist. This raises an important question concerning the reliability of sources: can conclusions be drawn about the majority of Scottish urban society with an over-representation of middle-class material and a dearth of working-class records documenting the qualitative experiences of old age? To attempt to redress this problem, various historians have looked at Scottish censuses and Poor Law material.¹³² Consequently, their emphases tend to be either the social conditions of poverty, or the

¹²⁹ *Testament of Thomas Carlyle* (1881) (NAS SC70/6/21).

¹³⁰ *Testament of Thomas Carlyle*. The child's chair that is referred to was Jane's as a child, and was kept for the entirety of their marriage. As a widower, the presence of the chair was a painful reminder that they did not have a child together. 'Her little bit of a chair is still here and always was. I have looked at it hundreds of times; from of old, with many thoughts. No daughter or son of *hers* was to sit there'. T. Carlyle, *Reminiscences*, p. 153.

¹³¹ C. Booth, *Aged Poor*.

¹³² Most notably, Ian Levitt and Andrew Blaikie have examined Poor Law Registers and Supervision Reports as well as the Scottish Census. However, much of their recent work concentrates on areas outwith Edinburgh and Dundee. See I. Levitt, *Government and Social Conditions in Scotland, 1845-1919* (1988); I. Levitt, *The State of the Scottish Working Class in 1843: A Statistical and Spatial Enquiry Based on the Data From the Poor Law Commission Report of 1844* (1979); and A. Blaikie, "Household Mobility in Rural Scotland: The Impact of the Poor Law after 1845", *Scottish Tradition*, 27 (2000). For detailed longitudinal demographic analyses, see M. Flinn, *Scottish Population History: From the 17th Century to the 1930s* (1977).

statistical data concerning families who shared a household with an older family member. Despite the challenges posed by a limited range of working-class biographies, biographical material has proven to be the most useful complement to quantifiable demographic analyses. Some of these limitations have been ameliorated by oral history work in Edinburgh and Dundee; specific social norms and family practices in early twentieth-century urban settings have emerged. These norms and practices can be organised into two major themes. Firstly, matrifocal kinship networks operated as social capital for family members throughout the life course; and, secondly, social and economic resources such as reciprocal care and housing were a function of intergenerational exchange. Older people in the working classes benefited more from caring relationships than financial support within their families.

In the nineteenth and twentieth centuries, female-centred family networks were predominant in specific industrial regions and urban areas throughout Britain.¹³³ Due to a combination of demographic and economic patterns, particular communities relied on women's social networks as sources of support and stability. In 1906, David Lennox observed in his PhD thesis concerning working-class life in Dundee: 'The women of a family are often the chief wage earner, and as the relative importance of the household is apt to be regulated by their contribution to the common purse, the father sinks in position...'¹³⁴ Modern historians who have examined these feminine organisations argue that due to their dominance within the immediate family and home, their control of the budget, and their close ties with other female relations, it was inevitable that women

¹³³ Areas with a similar component of a feminised textile industry such as Dundee include Blackburn's weaving community, in which grandmothers raised their grandchildren while mothers and sisters went to work in the mill. W. Woodruff, *The Road to Nab End* (2003) Sheila Thomson introduced me to this text because it reminded her of her own childhood experience in Lancashire after the Great War. *Interview with Sheila Thomson*, Edinburgh (26 May 2004) For some foundational English studies of working-class kinship ties and how older women functioned within them, see S. Meecham *A Life Apart: The English Working Class 1890-1914* (1977); P. Laslett, *Family Life and Illicit Love in Earlier Generations* (1977), ch. 5; and Anderson *Family Structure*.

¹³⁴ D. Lennox *Working Class Life in Dundee for Twenty Years 1878-1903* (1906), p.177 (UDA MS134/1).

played the major part in the functioning of the extended family.¹³⁵ A product of internalised concepts of traditional family structure and external socio-economic factors, the nature of these networks indicates that families adapted to the demands of the social environment in which they resided.

The distinctive character of Dundonian working-class kinship networks is an example of how families increasingly relied upon women as earners *and* carers. Older women in particular participated in kinship networks composed of daughters, granddaughters, nieces, and cousins. Within living memory, older women recall the various roles their female relations played within their extended families in Dundee.¹³⁶

Born in 1911, Bet Parks explained:

‘I had a lovely mother and my mother looked after my youngest child, when she was only six weeks old, and we didn’t have any money. We didn’t have a house and things like that and my mum said, “Look, I’ll mind her and you get back to work.” When I went back to the mill she looked after her and then my mother got me a house with a wee attic...’¹³⁷

Middle-aged and older women typically looked after younger female relations’ children so the mothers could return to work. Reflexively, when women were very old and dependent, they received various forms of assistance from their daughters or other women in the family. Although the infrastructure of these networks was principally female¹³⁸, men functioned as primary carers in the absence of a spare daughter. Such practices were most typical in families who had migrated to Dundee, and had not formed kinship networks in their community. An only child from Carmyllie, the scientist and inventor James Bowman Lindsay gave up a position on the scientific staff of the British Museum because this would have forced him to leave his widowed mother alone in

¹³⁵ Roberts, *A Woman’s Place*, p.180.

¹³⁶ Between 1 May and 1 September 2004 over fifty formal interviews were conducted in Dundee and Edinburgh. The material from these interviews is the basis for these analyses.

¹³⁷ *Interview with Bet Park*, Broughty Ferry (4 June 2004).

¹³⁸ Indeed, in such networks older men were usually the recipients of care, not the providers.

Dundee as an older woman. His biographer observed that Lindsay was ‘a willing martyr to filial devotion’.¹³⁹ Social obligation to older family members was one aspect of an elaborate system based on reciprocity.

The social function of kinship networks was the intergenerational exchange of care. Over the life course, family members entered into a variety of exchanges, which were mutually beneficial. As a social investment, younger cohorts provided for older cohorts within their family. This was done with the understanding that in old age they would similarly be the recipients of care from younger family members. These exchanges were not one-directional, however, but reciprocal in nature. Thus, older people provided younger family members with specific services, such as child minding, cooking, or light housework, in exchange for other forms of help or housing. An older Dundonian, Abigail Robertson recalled that her family’s experiences were typical of most families in the interwar period. She explained:

‘Mother had into go to the mill to bring us up, because all she had was the widow’s pension. I was the eldest girl. We had an aunt and uncle that lived next door and another aunt and uncle that lived around the corner. They were a very, very close family and they all helped to look after us...Uncle Bill, that was the one that lived next door to us, he always bought a piece of lamb on a Saturday, which was given us hot on a Sunday....[After] Mother’s death, the aunt that lived around the corner from us, she came and took the house over and [stayed with] us. Because by that time her husband had died too...’.¹⁴⁰

Mrs Robertson’s description illustrates how families operated as a source of capital. As older individuals became more dependent, younger kin were a primary source of care. Shaped by traditional family-centred practices and contemporary social norms, Scottish caring relationships can be compared with those of the English and Welsh. In his 1892 investigation of older populations in poor law unions in England and Wales, Charles Booth discovered that help from relatives was the most important form of assistance.

¹³⁹ A.H. Millar, *James Bowman Lindsay and Other Pioneers of Invention* (1925), p. 16.

¹⁴⁰ Murray and Stockdale (eds), *Miles Tae Dundee*, pp. 17-19.

He observed: 'A good deal of help seems to come from children, though the reports are by no means uniformly satisfactory...More is done than is generally thought'.¹⁴¹ In a smaller-scale study conducted in York in 1899, Seebohm Rowntree observed that the standard of life for most families was related to dependents' stage in the life course. Indeed, households with young children and older family members in them were most typically concentrated in the working classes and amongst the poor. An assortment of cryptic entries from such classes of families indicates that younger people typically shared resources with older family members. 'Fireman on railway. Single. Mother keeps house for her son; she is very delicate, and depends upon her son for support'.¹⁴² Such support commonly took form in intergenerational housing arrangements.

The intergenerational household was common in urban Scotland from the middle of the nineteenth century. This was due to social and economic factors. The lack of affordable housing until after the Second World War meant that many households were composed of multiple generations of family members. Enumerator reports taken in 1851 and 1901 commonly indicate two-generational households composed of older parents and adult children or grandparents and grandchildren, and to an even greater extent, three-generational households.¹⁴³ Thus many families pooled their resources and shared a household. The majority of working-class families were crowded into one-room single-end and two-room room-and-kitchen tenement housing; as recent as 1931, more than half of Dundee's families lived in a one or two-roomed house. (See Tables 1.18 and 1.19) Such close proximity to family members over the life course demanded much from the individual. For reasons arguably more social in nature, older people frequently lived in intergenerational households because proximity to family members facilitated care. Families from a variety of economic backgrounds preferred living in the same

¹⁴¹ Booth, *Aged Poor*, pp. 144-4, 182-3, 225-6, 255-6, 314-5.

¹⁴² Rowntree, *Poverty*, p. 63.

¹⁴³ Census Enumerator's Reports, Dundee and Edinburgh (1851 and 1901).

household. Older people went to great lengths to incorporate a younger member of the family into their homes. The historian R.J. Morris noted that older women in particular invited younger relations to share residence with them, providing the younger person with a place to stay, and often the promise of education or inheritance.¹⁴⁴ The reciprocal nature of these arrangements was addressed in David Johnston's reminiscences. At the age of fourteen, David was intended to move into his ageing aunt's home. However, she changed her mind, and elected to have David's older brother live with her instead. The consequences were that David remained with his parents and apprenticed with his ageing father as a baker. After several years of caring for his aunt, David's brother inherited a considerable sum of money.¹⁴⁵ Irrespective of financial considerations, the incidence of grandchildren living with their grandparents was high. Another means of securing care, older people moved into their children's houses. The chartist John McAdam was markedly philosophical about his housing arrangements in his son's home:

In this quiet corner provided by my exceptionally industrious and well-doing family, I sometimes ask myself...whether I have done right in devoting so much of my time and means towards these great national questions. As regards my own family I admit frankly that I ought to have studied their interests *first* rather than the interests of strangers...¹⁴⁶

Co-residence with carers provided older people with a qualitatively distinctive experience from older people who lived alone. Routine activities and affective ties in a multi-generational household, not to be taken for granted, must be understood as an essential resource for older people.

¹⁴⁴ R.J. Morris, paper on testamentary customs in the nineteenth century, School of History, University of St Andrews (21 November 2002).

¹⁴⁵ Johnston, *Autobiographical Reminiscences*, ch.4.

¹⁴⁶ J. McAdam, *Autobiography of John McAdam 1806-1883* (1980), pp. 93-4. McAdam lived in his son's home because he had lost his fortune in property speculation, which left him penniless at the age of seventy-seven.

Table 1.18 *Size and Occupancy of Housing, Edinburgh 1931*

Edinburgh	Number of Houses	Percentage (%)	Number Of People	Percentage (%)
1 Room	7,123	6.7	20,144	4.8
2 Rooms	33,591	31.8	134,787	32.3
3 Rooms	26,934	25.5	108,546	26.0
4 Rooms	15,687	14.8	60,541	14.5
5 Rooms	8,114	7.7	30,938	7.4
6 Rooms	4,202	4.0	16,816	4.0
7 and Over	10,051	9.5	45,981	11.0
All Private Houses	105,702	100.0	417,753	100.0

[Source: BPP. *Census of Scotland, 1931.*]

Table 1.19 *Size and Occupancy of Housing, Dundee 1931*

Dundee	Number of Houses	Percentage (%)	Number Of People	Percentage (%)
1 Room	6,347	13.7	14,588	8.5
2 Rooms	22,252	48.2	81,824	47.7
3 Rooms	10,405	22.5	44,485	26.0
4 Rooms	3,136	6.8	13,216	7.7
5 Rooms	1,343	2.9	5,450	3.2
6 Rooms	940	2.0	3,734	2.2
7 and Over	1,806	3.9	8,138	4.7
All Private Houses	46,229	100.0	171,435	100.0

[Source: BPP. *Census of Scotland, 1931.*]

An historical analysis of the role of the family in older people's lives indicates that external socio-economic factors intensified the imperative to form close family relationships. In the nineteenth and early twentieth centuries, Scottish families sensibly formed a variety of kinship networks that functioned as sources of capital throughout the life course. Older family members retained important roles in the family based on their responsibilities and their status. Indeed, older people took their roles as senior members of their families quite seriously. Similarly, younger family members were conscious of their own obligations concerning older relatives. The inability to provide for family members in old age was thus a tremendous source of concern for the family as well as

society in general. The persistence of poverty experienced by thirty per cent of older populations throughout the period moved social reformers to ask questions about the appropriateness of a *laissez faire* policy. Coupled with a demographic shift in proportion of older people in the population, a nascent form of gerontological study emerged in the interwar period. The re-evaluation of older people's roles in society led to further inquiry concerning the responsibility of the state for providing for its older citizens. As a contradiction to vehement critics of old-age policies, Scottish families distinctively retained an ethos of autonomy throughout the period. It remains to be explored how Scottish families responded to the introduction of the welfare state in 1946.

CHAPTER TWO

OLDER PEOPLE IN SCOTLAND: IDENTITY AND SOCIAL CAPITAL IN THE TWENTIETH CENTURY

OLD AGE IDENTITY AND STATUS: SOURCES AND DISCOURSES (2.1)

The social and economic circumstances of older people and their families in Great Britain changed most rapidly in the twentieth century. As older age population groups began to increase and sources of familial support respectively decreased in the interwar period, it became apparent that older people's needs had to be met with a combination of informal and statutory services. The introduction of old age pensioner policies in 1946 and 1948 granted older people with certain social and economic rights based upon their status as Old Age Pensioners (OAPs), a source of identity and autonomy outwith their families. Such autonomy was essential, given that trends in marriage, family formation, and family transitions altered considerably in a period of fifty years. By 1999, a majority of older people in Scotland enjoyed a degree of independence and quality of life measurably better than older cohorts in previous generations. In the light of such advances, a good old age has been expressed in terms of progress¹ and citizens' rights²; however, a massive amount of current and past literature presents an ageing population as a problem³. While British historical analyses of ageing populations in the post-war period have been limited in number, the field of social gerontology has

¹ Richard Titmuss was one of the first to argue that an increase in older population groups was a sign of progress, and not a burden on society. R. Titmuss, *Essays on the Welfare State* (1958) and International Association of Gerontology London, *Old Age in the Modern World* (1955). Peter Laslett's *A Fresh Map of Life: The Emergence of the Third Age* (1989) interprets the post-retirement stage of life as one of opportunity and personal achievement. A recent article challenges a consensus by stressing that ageing is not something to be feared, but something to be welcomed. A. Browne and A. Blenford, "A Grand Old Age", *The Observer* (12 May 2002).

² T.H. Marshall related old age as an identity built around the rights of citizenship. T.H. Marshall, *Citizenship and Social Class* (1950). Geoffrey Finlayson's analysis of the older citizen in Britain contextualises the periodic shifts of thought concerning the role of the citizen in the welfare state. G. Finlayson, *Citizen, State, and Social Welfare in Britain 1830-1990* (1994). Two most provocative arguments concerning older people's active roles in terms of exercising citizens' rights have been those of A. Walker, "The Politics of Ageing in Britain", in C. Phillipson; M. Bernard; and P. Strang (eds), *Dependency and Interdependency in Old Age: Theoretical Perspectives and Policy Alternatives* (1986) and A. Blaikie, "The Emerging Political Power of the Elderly in Britain 1908-1948", *Ageing and Society*, **10** (January 1990).

³ A few examples of early works include health and social investigations such as, Nuffield Foundation, *Old People: Report of a Survey Committee on the Problems of Ageing and the Care of Old People* (1947); BPP. *The Report of the Committee on the Economic and Financial Problems of the Provision for Old Age*, Cmd.9333 (Dec. 1954); I.M. Richardson, *Age and Need: a Study of Older People in North-East Scotland* (1964); and J. Williamson, et al, "Old People at Home: Their Unreported Needs", *The Lancet* (23 May 1964).

significantly progressed in the past four decades. Therefore, discourse concerning older people's roles in their families and in modern society has been uneven. The accumulation of intellectual thought concerning old age as an identity and as a social experience raises two important questions. Firstly, have social norms concerning ageing changed in comparison to those in the past; and secondly, what social and economic factors influenced caring relationships with older family members in the post-war period? Although the extended family and fictive kinship networks continued to be the most valued resources by older people throughout the period, the individual experience of being an older person, by contrast, changed most dramatically.

The problems of growing older have been central to discourse about ageing population groups. During the Second World War, the economist William Beveridge expressed great concern about inadequate incomes of the old. In response to the social problem of economic want, Beveridge outlined a comprehensive policy of social progress in *Social Insurance and Allied Services*.⁴ His emphasis on an attack on want influenced social investigators and researchers for several decades.⁵ In 1953 the Government appointed the Phillips' committee to: 'review the economic and financial problems involved in providing for old age, having regard to the prospective increase in the numbers of the aged and to make recommendations'.⁶ The prospect of a greater proportion of older people raised important questions about the dispersal of economic resources and inequality. In a period of relative prosperity, Brian Abel-Smith and Peter Townsend 'rediscovered'⁷ poverty in their investigations of older populations.⁸ In one of their

⁴ W. Beveridge, *Social Insurance and Allied Services* (Cmd 6404, 1942).

⁵ In 1955 social policy specialist Richard Titmuss observed that much anxiety about the economic effects of an 'ageing' population could be traced to the Beveridge Report, which was influenced by the assumption of a large increase in the population of pensionable ages. R. Titmuss, "Pension Systems and Population Change", in *Essays on the Welfare State* (1955), pp. 57-8.

⁶ BPP, *Report of the Committee on the Economic and Financial Problems of the Provision for Old Age* (Cmd. 9333, 1954), Introduction.

⁷ Titmuss as well as Abel-Smith and Townsend challenged contemporary beliefs that poverty had been conquered. In the early fifties, with the publication of the last of Seebohm Rowntree's surveys on poverty in York and his discussion of the effects of welfare reform, it was initially believed that the welfare state had

numerous studies conducted in the 1950s and 1960s, Abel-Smith and Townsend found that over two-thirds of British households with low expenditure had heads who were retired.⁹ Concerns about the elderly and economic exclusion were applied to studies about social exclusion as well. The most notable of these were conducted by the sociologist Jeremy Tunstall, who addressed the problem of social poverty and loneliness among Britain's aged poor. Basing his work on Peter Townsend's study of life in Residential Homes (*The Last Refuge*), Tunstall researched groups of older people, of which one in six were socially isolated.¹⁰ Both loneliness and low incomes were assessed in one of the very few Scottish studies conducted in the 1960s. Dr I.M. Richardson's studies of older people in the north east of Scotland suggest that the prevalence of loneliness and poverty was very similar to that found in other surveys of older people; between 15 and 25% of older people living alone were 'lonely', and approximately a third of older people were drawing National Assistance Allowances. In Richardson's studies, two-thirds of the respondents were widows.¹¹ Evidence of economic and social poverty in old age promulgated the belief that growing older was a social problem; for several decades, this was reinforced by a body of social theories in the fields of gerontology and sociology.

Theoretical work in the area of social ageing conducted over the past forty years represents a period in flux. A reflection of the rapid rate of change in Western society, social trends in ageing populations outpaced theoretical analyses. Because gerontology was a new field emerging in the social sciences, most of the research conducted in the

put an end to poverty. B. Seebohm Rowntree, *Poverty and the Welfare State* (1951). National measures of improvements in standard of living hid the relative unevenness of the spread of prosperity and poverty throughout Britain. Northern England and parts of Scotland were left out of the general increase in prosperity. There remained notorious slums in some of Britain's major cities, most notably Glasgow and Dundee, and therefore many older people were still living in accommodation without basic amenities.

⁸ B. Abel-Smith and P. Townsend, *New Pensions for the Old* (1955) and *The Poor and the Poorest* (1965). A most thorough examination of poverty and older population groups in the post-war period is P. Townsend's *Poverty in the United Kingdom: a Survey of Household Resources and Standards of Living* (1979).

⁹ Abel-Smith and Townsend, *Poor and the Poorest*, p. 30.

¹⁰ J. Tunstall, *Old and Alone* (1966), p.1.

¹¹ Richardson, *Age and Need*, pp. 67-8, 85. Like most research conducted in the 1960s in the nascent specialist area of geriatric medicine, much of Richardson's data is flawed by being under-representative and his analyses are prone to generalisations.

1960s tended to be social surveys and data collections, and thus emphasised the problem of ageing in quantitative terms. The development of a unified theoretical discourse was further hindered by factors such as intellectual isolationism. This can be understood in two contexts. Firstly, a majority of old age scholarship was concentrated in the field of sociology in France, and most gerontological work took place in America. Consequently, this set a precedent to the effect that until most recently, many developments in the field of social gerontology in America have been well ahead of those in other Western nations such as Great Britain. Secondly, research into social aspects of ageing has been confined within particular disciplines, which has inhibited progress in the development of a unified theory for old age. The progression of theoretical and practical interpretations of older population groups in Britain must therefore be contextualised in relation to dialectical movements in the social sciences. The period is marked by three separate areas of discourse, which ultimately impacted the separate development of old age theory in the field of social gerontology. Firstly, social scientists' analyses of minority population groups were influenced by contemporary social problems of poverty and exclusion in the 1960s; secondly, concerns about the distribution of power and social injustice in the 1970s and 1980s formulated the basis for stratification and dependency theories; and, lastly, critical theory emerged in the last decade of the twentieth century as a response to postmodern¹² questions about individuals' experiences and identity. An historical analysis of the development of these perspectives over time reveals a shift in emphasis from ageing as a social problem to that of a social process.

¹² Postmodernism has emerged as an area of academic study since the mid-1980s, and is a concept that appears in a wide variety of disciplines or areas of study. Postmodernism is the critique of grand narratives, the awareness that such narratives serve to mask the contradictions and instabilities that are inherent in any social organisation or practice. Postmodernism, in rejecting grand narratives, favours 'mini-narratives', stories that explain small practices, local events, rather than large-scale universal or global concepts. Postmodern 'mini-narratives' are always situational, provisional, contingent, and temporary, making no claim to universality, truth, reason, or stability. Thus postmodernists include groups such as the elderly who have typically been excluded. M. Klages, "Postmodernism", <www.colorado.edu> (1 May 2005).

The outpouring of theoretical development in the 1960s was driven by a sustained concern about social inequality in the modern age. In his introduction to his second volume of a *Critique of Everyday Life*, the French philosopher and sociologist Henri Lefebvre explained that:

The object of our study is everyday life, with the idea, or rather the project (the programme), of transforming it.... *Uneven development* remains the prime law of the modern world, and there is much to learn and be said about it. The distance-the gulf- between the everyday and technology is mirrored by the gulf between investment in the arms industry or interplanetary exploration and investment in the construction of new housing estates.¹³

One of Lefebvre's most influential social theories was the extension of the arena of everyday life and relations between the household and society at large into an overarching analysis of urban life. The method of theorising the relationships and linkages of individuals in society in terms of polarities was applied to questions about insider and outsider population groups. Within this intellectual climate, Elaine Cumming's and William Henry's disengagement theory in the American field of gerontology underscored the practice of social marginalisation in old age. The premise of their theory was that the elderly person and society undergo a process of mutual withdrawal, and a lowering of activities and involvement with social interaction were regarded as correct ageing.¹⁴ Because withdrawal from society was argued to be a beneficial process rather than a social problem in their theory, Cummings and Henry were criticised by their peers.¹⁵ The principle of disengagement contradicted contemporary theoretical approaches by providing justification for the exclusion of the elderly, and indeed the practice of ageism. Thus early gerontological theories in America clearly lagged behind those in the social sciences in Europe. Nonetheless, like Lefebvre's

¹³ H. Lefebvre, *Critique of Everyday Life, vol. II: Foundations for a Sociology of the Everyday* (1961), Pp. 2-3. The basis for this work was his first volume, *Critique of Everyday Life* (1947).

¹⁴ E. Cumming and W. Henry, *Growing Old: The Process of Disengagement* (1961).

¹⁵ Disengagement theory has been described as: 'the geriatric euphemism for social death'. See D.O. Cowgill and L.D. Holmes, *Ageing and Modernisation* (1972).

theoretical works, Cummings' and Henry's central argument also raised important questions about the cultural attribution of difference and age segregation. These themes were central to Jeremy Tunstall's research and proto-theory concerning isolation in old age.¹⁶ Tunstall's sociological study of older people in Britain was driven by four factors of aloneness: living alone, social isolation, loneliness, and anomie on a progressive continuum. More importantly, he explored the theme of social isolation in the context of the individual life cycle. He argued that: 'old age is for each person who reaches it a new experience; how they performed that role was influenced by their life histories'.¹⁷ Analyses of older populations in terms of the individual were exceptional in contemporary theoretical discourse.

In the 1970s and 1980s, the problem of social inequality in older population groups was addressed in terms of the unequal distribution of wealth and the nature of power within society over a lifetime. Marxist interpretations of status and social capital were prevalent in European scholarship. The French sociologist Anne-Marie Guillemard and philosopher Simone de Beauvoir analysed social relations, *vis-à-vis* social capital¹⁸, as a cultural context over time, as well as how such relations determined the content of old age. De Beauvoir examined the shared experiences of status in society as a whole, observing that: 'Society looks upon old age as a shameful kind of secret that is unseemly to mention'.¹⁹ In terms of the individual, Guillemard maintained that the reproduction of social and class relations at every age strata influenced social status in old age.²⁰ In

¹⁶ Pierre Bourdieu has looked at similar attributes of social poverty, expanding upon this with his conception of *la petite misère*. 'Using material suffering as the sole measure of all suffering keeps us from seeing and understanding a whole side of the suffering characteristic of a social order which, although it has reduced poverty overall (though less often than claimed) has also multiplied the social spaces (specialised fields and subfields) and set up the conditions for unprecedented development of all kinds of ordinary suffering'. P. Bourdieu (ed.), *The Weight of the World: Social Suffering in Contemporary Society* (1999), p. 4.

¹⁷ Tunstall, *Old and Alone*, p. 233.

¹⁸ In this sense, social capital can be understood to be the accumulation of kinship networks.

¹⁹ S. de Beauvoir, *Old Age* (1977), p.7.

²⁰ A. Guillemard, "Old Age, Retirement, and the Social Class Structure: Toward an Analysis of the Structural Dynamics of the latter Stage of Life", in T. Haraven and K. Adams (eds) *Aging and Life Course Transitions: An Interdisciplinary Perspective* (1982), p. 225.

keeping with these theories, Peter Townsend's application of stratification theory in relation to older people's unequal roles raises important questions such as: has the modern welfare state turned a section of older people into a dependent class? Townsend approached status on a collective basis of cohort and class experiences in his critiques of the British Welfare State. The problems of marginalisation and dependency in old age were central to his structured dependency theory.²¹ 'The dependency of the elderly has been structured by long-term economic and social policies: elderly people are perceived and treated as more dependent than they are or need to be by the state...In short, ageism has been and is being institutionalised in modern society'.²² Townsend's theoretical work emphasised the insecure status of older people in terms of their relationships with the state. Thus old age continued to be interpreted by British social scientists as a relatively homogeneous social problem.

The heterogeneity of ageing indicated that the analysis of old age from a problem-solving perspective was inadequate. In this respect, gerontological theory in the UK had fallen behind current social and economic trends and practices of the majority of older people and their families. This was further magnified by a ten-year gap in theoretical discourse. In the 1980s, the American gerontologists Tamara Haraven and Kathleen Adams structured their theories upon individual experiences of ageing as a process in the context of the life course. Life course theory links progressive life transitions with biographical experience by addressing the interaction between individuals, family, and historical time.²³ Building upon Haraven's and Adams's arguments on the basis of family relations and transitions, British sociologists Sara Arber

²¹ Structured Dependency theory can be understood as a social determinist perception of the frameworks of institutions and rules which affect older populations. Townsend explored this theme for many years, beginning with his influential paper, "Structured Dependency of the Elderly: a Creation of Social Policy in the Twentieth Century", *Ageing and Society*, **1** (March 1981).

²² P. Townsend, "Ageism and Social Policy" in C. Phillipson and A. Walker (eds), *Ageing and Social Policy: A Critical Assessment* (1986), p. 15.

²³ T. Haraven, "The Life Course and Aging in Historical Perspective", in T. Haraven and K. Adams (eds) *Aging and Life Course Transitions: An Interdisciplinary Perspective* (1982), p.5.

and Maria Evandrou applied a conceptual framework of life course theory in the 1990s based on transitional processes. The valuation attached to occupancy of different social roles at different times was their basis for an analysis of three major transitions undertaken by the older citizen: the transitions in family roles, transition from paid work, and the transition in health and caring needs.²⁴ Hence the status of being old is understood as a culmination of the patterns of an individual's life course in its entirety. Such individuated approaches to old age are a by product of postmodernism. Only quite recently have British gerontologists applied postmodern theoretical models as the basis for an integrated social theory of ageing.²⁵

Building on social research concerning how older people relate to different groups within the spheres of the community and kinship relations, the social gerontologist Chris Phillipson interprets the effect of postmodernity on old age. Phillipson argues that older people live with an identity problem, resulting from the extension of individualisation. He makes a strong case for focusing on a micro-sociology of daily living, a socially constructed space that lends some form of predictability to everyday relationships; older people sustain their sense of self and identity in the context of the distinctive ways in which daily life gives shape and meaning for the individual.²⁶ Therefore 'oldness' as an identity would be determined on the basis of an individual's adaptations to their particular cultural climate. Such subjectivity provides a different set of theoretical challenges which remain to be resolved. Relativist definitions of old age make it more difficult to address the collective experiences of a cohort because the

²⁴ S. Arber and M. Evandrou, "Mapping the Territory: Ageing, Independence and the Life Course", in S. Arber and M. Evandrou (eds), *Ageing, Independence and the Life Course* (1993), pp. 12-15.

²⁵ Simon Biggs and Jason Powell have written numerous articles about postmodern constructions of identity in old age. Powell explored the interconnection of social theory to social aspects of ageing and the 'ageing body' as a primary form of analysis. J. Powell and C.F. Longino, "Postmodernism Versus Modernism: Rethinking Theoretical Tensions in Social Gerontology", *Journal of Aging and Identity*, 7 (December 2002).

²⁶ C. Phillipson, *Reconstructing Old Age* (1998), pp.49 and 139. An emphasis on daily living can be viewed as a modern application of Henri Lefebvre's sociology of the everyday. Lefebvre, *Critique of Everyday Life and Everyday Life in the Modern World*.

practice of self-identification is pre-eminent. The transmission of postmodern theoretical conceptions of selfhood into the public domain has had a remarkable affect on older people's definitions of ageing in more recent times. Subjective re-interpretations of old age and self-definitions underpin modern ideas about active ageing. Thus many individuals have a difficult time identifying themselves in terms of their chronological age. More to the point, older people have articulated that they do not feel old.²⁷ An analysis of personal and social definitions reveals that 'feeling' old and 'being' old are two distinct attributes of the ageing process. The former can be understood in the realms of health and mental attitude, which are inherently individual experiences. The latter can be generalised in terms of a status based on social norms and beliefs about what it means to be old, irrespective of how the actor 'feels'. The interplay of micro and macro perspectives taken from various theoretical models over the past four decades provides a useful tool for investigating old age as an identity in the post-war period.

The overrepresentation of the problems of old age in formal sources raises the question as to the origins of negative old age discourse in the modern period. A review of government papers over the past 150 years reveals that older people's status was typically expressed in terms of 'the aged poor' and 'the aged and infirm'. Legislation is notably worded in this manner in the Poor Law Commission for Scotland (1844) as well as the New Poor Law (Scotland) Act (1845). A textual analysis reveals that the use of language in sources such as the New Poor Law set a precedent for future works concerning old age.²⁸ Over one hundred years later, Rowntree correlated old age (above the age of seventy) with the diminution of intellectual power and physical infirmity in his

²⁷ P. Thompson, C. Itzin and M. Abendstern, *I Don't Feel Old; The Experience of Later Life* (1990), Introduction.

²⁸ To this effect, the Minority Report of the *Royal Commission on the Poor Laws and Relief to Distress, Report on Scotland (1909)* stated: 'It is a necessary preliminary of any effective reform to break up the unscientific "the aged and infirm", and to deal separately with distinct classes according to the age, and the mental and physical characteristics of the individuals concerned'. This recommendation was disregarded.

apocalyptic views of an ageing population.²⁹ A *non-sequitur* in *Social Trends 30* (2000) is similarly alarmist: ‘...life is marred by elderly infirmity’.³⁰ Ongoing concerns about poor law relief, pensions, and statutory old age policies thus reinforced the correlation of ageing with infirmity in nineteenth and twentieth-century literature.³¹ In his review of primary and secondary sources over the period, John Vincent observed that: ‘Elderly people are stereotyped as having disabilities and share with disabled people the disadvantages of a negative image. [They] are not necessarily disabled...[rather] they experience similar social disadvantages to other disabled people’.³² Status based on external perceptions of older age population groups on such terms has been inherently restrictive to those who were capable. Indeed, a majority of older people under the age of 85 were *not* disabled. Quantitative data to this effect³³ is generally contradicted by formalised images of disability in old age. Common examples of this may be found on public transportation and on signposts³⁴ erected by local councils over the past several decades in neighbourhoods where a higher concentration of older people reside. These signs depict a frail older couple in possession of walking sticks. Such portrayals and use of language have institutionalised misconceptions of the ageing process, thereby shaping discourse in terms of older people’s limitations.

Over the past thirty years, the loss of power in old age has been compared to the powerlessness associated with women and children. These views are well represented in

²⁹ Nuffield Foundation, *Old People: Report of a Survey Committee on the Problems of Ageing and the Care of Old People* (1947), pp. 1-2.

³⁰ N. Amaranayake, *et al*, *Social Trends 30* (2000), p. 19. <www.statistics.gov> (1 March 2005).

³¹ An indication of the prevalence of modern sources associating old age with disability, an informal search on the internet reveals that over 40,000 hits matched the search for combinations of old age, disability, and dependency. Many of these matches made reference to formal sources such as British government papers, social investigations, and surveys. (1 June 2005).

³² J. Vincent, *Inequality and Old Age* (1995), p. 20.

³³ For instance, only 20% of the 65-85 age bracket in Great Britain reported mobility difficulties in the 2001 General Household Survey. Nonetheless, government bodies such as the Scottish Local Authorities emphasised in 1999 that approximately 76% of clients receiving home care services provided by local authorities were people with physical disabilities, of whom 84% were aged 65 years or older. Scottish Local Authorities, *Age and Client Group of Home Care Recipients* (March 1999).

³⁴ The most common of these are those listed in the British highway code within the section on warning signs. The older couple on the depiction are described as: ‘Frail (or blind or disabled if shown) pedestrians likely to cross road ahead’. The Highway Code (2004) <<http://www.highwaycode.gov.uk/signs05.htm>>

a variety of sources. In feminist interpretations of old age, a number of characteristics which have been attributed to femininity, such as dependency and the need for protection, are viewed as aspects of old age.³⁵ However, there is a problem in pursuing this association any further. Unlike the experience of gender, *everyone* who reached old age underwent ageing processes throughout the life course, 'old' old age being the culmination of these processes for both older men and women. Much like the question of gender and status, the parallel between old age and young age produces its own set of contradictions. Jenny Hockey and Allison James argued that older people and children shared the same status in society on the grounds of dependency.³⁶ Of the many reasons why the correlation between infancy and 'old' old age is problematic, the most important point to consider is that dependency in old age is not inevitable. While all infants are entirely dependent upon their carers, many older people retain a form of autonomy for the remainder of their lives. Nonetheless, both formal and informal carers described old age in these terms, placing much emphasis on the status of being a dependant in the beginning and end of a person's life.³⁷ In a British care management assessment of nurses' perspectives of the elderly over the past two decades, the most common way of describing their patients was in terms of mental or physical dependence.³⁸ Similarly, social gerontologists Hazel Qureshi and Alan Walker observed in their study of informal caring relationships in Sheffield in the 1980s that many of their respondents stressed transitions from interdependency to dependency. 'He is so dependent now. It's a strange thing...I really should get some help but I would rather do it for him myself and then feel as if I

³⁵ J. Bardwick and E. Douvan, "Ambivalence: The Socialisation of Women", in V. Gornick and B. Moran (eds) *Women in Sexist Society: Studies in Power and Powerlessness* (1971), p.227.

³⁶ J. Hockey and A. James, *Growing Up and Growing Old: Ageing and Dependency in the Life Course* (1993).

³⁷ French sociologist Gabrielle Balazs described an older woman's experience at hospital as 'the beginning of an irreversible process of being taken in charge'. G. Balazs, "Solitude" in P. Bourdieu (ed.) *The Weight of the World: Social Suffering in Contemporary Society*, (1999), p. 599.

³⁸ S.A. Cooper and P.G. Coleman, "Caring for the Older Person: an Exploration of Perceptions Using Personal Construct Theory", *Age and Ageing* **30** (September 2001), p.401.

looked after him like he looked after me when I was young’.³⁹ Because some older people needed a lot of support, negative assumptions and ageist attitudes about the ageing process were generalised by a variety of care givers to the entire elderly population.

The social implications of an increasing incidence of prejudice against old people have been addressed in terms of alarmist responses to demographic change in the twentieth century, which are often manifested in socially-condoned practices of stereotyping old age. Why such prejudice has been on the rise in the post-war era was the premise in the BBC Radio 4 Reith lecture, *Brave Old World*:

With our longer life spans we are entering uncharted territory in which the challenges for individuals and societies are formidable. They are formidable not least because we cherish extraordinarily negative stereotypes of the ageing process. The stereotypes have, if anything, grown more negative as life expectancy has increased. Survival to old age is less of an achievement and as life has become more secure, the inevitability of eventual ageing seems more of an affront.⁴⁰

Stereotypes of older people indicate an ambivalence towards growing older, and have proven to be difficult to expunge from society’s psyche. The persistence of stereotyping over time has perpetuated misunderstandings between older and younger age cohorts; older people have been intermittently vilified and idealised in the public domain. The oral historian Paul Thompson observed that: ‘the quiet kindly grandmother, the benevolent granddad, and the wise elder are set against the dried-up spinster, the interfering granny, the miser, the dirty old man, and the bed soiler’.⁴¹ Thompson’s examples suggest that stereotyping can be understood as a form of establishing a group image based on otherness. Socially-normed perceptions of old age have undoubtedly been shaped by contemporary artistic impressions and communications. The former Director of Age Concern described some of the persistent images of ageing in the arts:

³⁹ H. Qureshi and A. Walker, *The Caring Relationship: Elderly People and Their Families* (1989), p. 163.

⁴⁰ T. Kirkwood, *Brave Old World* (2001), p.2.

⁴¹ Thompson, et.al, *I Don’t Feel Old*, p. 4.

The ageing process is deeply enshrined in a range of images leading to stereotypes based on notions of intense wisdom...at one end of the spectrum, to uselessness...at the other. There are a range of half-truths and fantasies about age, knowledge, and experience which have become enshrined in the folk culture of ageing. [Many] have their root in art and literature.⁴²

The polarisation of older people's roles in society can be seen in a broad selection of sources in the media⁴³.

There has been a tendency in the arts to exaggerate the negative attributes of growing older. One of the grimmest examples is a cartoon obtained from the satirical magazine *Punch*⁴⁴, which on numerous occasions has portrayed older people in pathetic circumstances. In 1985, Tony Husband contributed to *Punch* with his cartoon, which features an older couple trying to raise enough funds for the wife's presumably imminent funeral (see Illustration C). Functioning as a social comment, the older woman and her husband represent the worst case scenario of old age: the couple are victims of social and economic neglect, and in such a state, can only look forward to a pauper's grave. The period before death and the grieving process following widowhood have been the subjects of several British films over the past decade. In *The Winter Guest* (1997), set in a seaside town in Fife, Scotland, an elderly woman arrives unexpectedly at the home of her recently widowed grown-up daughter, offering unsolicited advice and opinions. The mother is thus stereotypically characterised as an interfering old woman; likewise the daughter is feeble. Equally stereotypical in nature, the premise of the 1990s BBC sitcom "One Foot in the Grave" was working men's dread of retirement and uselessness in old age. The most desperate and problematic attributes of growing older have been featured in many artistic forms, contributing to further misconceptions of normal ageing.

⁴² D. Hobman, "Myths and Realities of Ageing", *Social Work Today* (3 January 1978), p.18.

⁴³ It is worth noting that despite post-war technological progress in the transmission of and accessibility to information, e.g., by means of world service radio broadcasts, television programs, films, and websites on the internet, the portrayal of old age has tended to remain at both extremes.

⁴⁴ *Punch*, a magazine devoted to humour and satire, ran from 1841 until 2002. A British institution with an international reputation for its witty and irreverent take on the world, it published the work of some of the greatest comic writers of the day (Thackeray, P. G. Wodehouse, and P. J. O'Rourke among others). Its social cartoons captured life in the nineteenth and twentieth centuries. Website of Punch Magazine, <www.punch.co.uk>, (1 March 2004).

Illustration C: *Punch* Cartoon, Tony Husband (1985)



[Source: Punch Image Gallery <www.punch.co.uk> (1 March 2004).]

At the opposite end of the spectrum, a comparatively smaller number of television broadcasts and films portrayed older people in terms of ‘a good old age’; sometimes this was done to the extent that their unique identity as older people was negated by the impetus of appearing to be younger than their age. American historian Theodore Roszak has observed that youth culture has strongly impacted the media in Western cultures over the past several decades, which has resulted in a dearth of authentic images of ageing on the screen.⁴⁵ Roszak argues that many older roles either do not exist, or are portrayed in a manner in which older people are played ‘young’. Examples of age-defying roles can be found in some of the most popular television broadcasts and films in the modern period. The British television programme *The Last of the Summer Wine*⁴⁶, aired from 1973 over a 30-year period projected a Peter Pan image of older men. Indeed, the characters in the show possessed very few of the qualities more commonly associated with becoming an older person. Similarly, Susan Hampshire’s eccentric character Molly defied ‘young’ old age by forming a semi-romantic attachment with the estate’s ghillie well over a decade her junior and by engaging herself in activities such as riding a bicycle (albeit against her doctor’s recommendations) in the popular Scottish television series *Monarch of the Glen*. One of the most influential of Scottish actors, Sean Connery, has for several decades played roles which belied his years. At the age of seventy-five, Sir Sean was portrayed in the media as a man in his prime. Characterised by being engaged in physical or mental activities which tend to be portrayed by people much younger than themselves, this selection of older people in the

⁴⁵ T. Roszak, *Longevity Revolution: as Boomers Become Elders* (2001), Pp.152-53. Roszak argues that when the age cohort born between 1945 and 1955 reach old age, that their influence as consumers will be more keenly felt in the media, which should tremendously affect the manner in which older people are portrayed on television and in films.

⁴⁶ The longest-running British TV sitcom of all time, “Last of the Summer Wine” depicted the twilight years of a trio of oddly philosophising, whimsical old men in the Yorkshire Pennines who return to a carefree second childhood. They get up to all sorts of mischief and are determined to fulfil ambitions for which younger men would have already considered themselves too old. <www.bbc.co.uk> (1 June 2005).

arts are representative of an agenda to defy old age. An emphasis on the extremities of old age suggests a generalised anxiety about the challenges and realities of growing older.

Polarised representations of old age in the arts and formal sources have operated as normalising processes in the construction of the ageing self. While many of these limits were set in the public domain, they were often internalised by older people themselves. Because older age cohorts in the immediate post-war period lacked a large pool of role models, a majority of older people, especially women, tended to conform to socialised expectations of old age. Therefore, traditional practices such as social conduct and dress continued to influence older people's concept of self for several decades. These influences have been described in contemporary written and oral accounts: '[In the 1960s] they all looked old, even at fifty. Even my mother-in-law was an old lady. Dressed in dark green, maroon, or black and in the afternoon, what she called a diddly, a wee fancy apron...'.⁴⁷ Recollections of older ladies in long black dresses have profoundly coloured prevalent images of ageing. As a consequence, the personal and social phenomenon of old age has tended to be considered a comparatively homogeneous experience, marked by a rapid withdrawal into old age. Only in more recent times have such views been challenged, and diversity has become the norm in terms of group identity. This transformation in self-perception and group discourse can be correlated to the demographic patterns of the twentieth century; as the likelihood of reaching old age gradually increased, older population groups grew in number in the post-war period. Thus, the emergence of heterogeneous definitions of self in old age in the recent past is explained as part of an historical process.⁴⁸ Rather than a uniform experience, old age is beginning to be viewed within theoretical discourse as a series of progressive stages.

⁴⁷ Clark and Carnegie, *She Was Aye Workin'*, p. 171.

⁴⁸ Andrew Blaikie describes the modern development of self and identity in terms of progress: 'Popular perceptions of ageing have shifted, from the dark days when the "aged poor" sat in motionless rows in the workhouse, to a modernising interwar phase when 'the elderly' were expected to don the retirement uniform, to postmodern times when older citizens are encouraged not just to dress "young" and look

A broad spectrum of social theories and publications relating to old age and identity has provided the structure for post-war discourse in the social and human sciences. The emergence of social gerontology as an interdisciplinary field of study in the United States and the UK was an attempt to address the implications of demographic change and the ageing of their populations from empirical and theoretical perspectives. Indeed, social theories have highlighted the particular ideas and circumstances which have influenced understandings of old age in recent decades. The major theoretical ideas in the post-war period have used the language of functionalism, Marxism, feminism and postmodernism. A feature of post-modernity, it has been noted that such theories have often mirrored the norms and values of their creators and their social times, reflecting culturally dominant views of what should be the appropriate way to analyse social phenomena.⁴⁹ Central to these analyses has been a growing interest in identity as a means of interpreting changes from modern to postmodern definitions of old age. A key component of this process has been the erosion of a predictable framework for an ageing identity, previously supplied by cultural and institutional forces. As unprecedented population changes have occurred, cohort differences have become evident among older age groups.

youthful, but to exercise, have sex, take holidays, [and] socialise in ways indistinguishable from those of their children's generation'. A. Blaikie, *Ageing and Popular Culture* (1999), p.104.

⁴⁹ J. Powell, "Theorising Social Gerontology: The Case Of Social Philosophies Of Age", *The Internet Journal of Internal Medicine* **2:1** (2001).

**WHAT IS OLD?
PERSONAL DEFINITIONS OF
OLD AGE AS AN IDENTITY
(2.2)**

The cumulative influences of formal discourse and popular perceptions of old age over the period raises important issues about what older people themselves thought about their roles in society and within their families⁵⁰. A review of original sources suggests that while older people have been affected by predominantly negative portrayals of the elderly, their notion of self contradicts popular perceptions and their own preconceptions. Thus, identity is as much shaped by the various transitions involved with ageing. To address these processes, a wide assortment of sources have been selected to represent both British and international social trends concerning the social experience of old age. Personal accounts, published oral histories, and original material drawn from interviews conducted in the Central Belt and Tayside in 2004, reveal a tremendous range of experiences in old age. From this extensive collection of materials, specific aspects of ageing emerged with regularity in both the written and oral sources. These can be examined in three lines of inquiry: firstly, how did older individuals define 'old age'? The most common definitions emphasised the dissonance between internalised preconceptions of what is old, chronological age, and authentic experiences, indicating a dramatic shift in expectations of old age over time. Secondly, what challenges did people face by becoming an older person? The majority of older people referred to the effects of numerous changes and losses, and how these were magnified by taking place in a relatively short space of time. Thirdly, how did people adapt to the ageing process? The importance of attitude and state of mind as adaptive processes was stressed in most of

⁵⁰ For instance, in her study of 3,500 older people interviewed in Belgium in the period 2001-2002, Thérèse Jacobs suggests that people in older age groups develop self-definitions of old age underpinned by theoretical discourse and ideology of active ageing promoted in society. T. Jacobs, *Being Old, Feeling Old: Between Autonomy and Dependency in an Era of 'Active Ageing'*. ESA Research Network on Ageing in Europe, Seventh ESA Conference. Torun, Poland (9-12 September 2005).

the oral history interviews as well as in the biographical material. Fundamentally, the manner in which older people adapted to the ageing process reflected their experiences over the life course. An analysis of older people's views on old age reveals how these themes have shifted in emphasis from fairly limiting conceptions of ageing to those of flexibility and personal choice.

Modern understandings of the relationship between the gradual nature of the ageing process and the emergence of old age as an identity have been expressed in a wide range of social investigations and oral histories. A selection of these raises the central question of how individuals defined old age, which has produced some vitally insightful responses. Fundamentally postmodern in premise, these can be analysed in terms of individual and group identity. In the first instance, individuals' consciousness of the onset of old age was quite relative. This was expressed in numerous oral histories⁵¹, in which all of the respondents had contradictory answers about when they began to feel old and what they felt about being an older person. At the age of eighty, the essayist Malcolm Colley provides a reason for this: 'The aging person undergoes another identity crisis like that of adolescence...for the rest of adult life he had taken himself for granted...in his new role, he is called upon to play a role that must be improvised'.⁵² A significant by-product of such 'improvisation' is that as people grew older, they were *less* inclined to view themselves as old until they reached a very old age. This has been articulated in British oral histories to the extent that many individuals in their seventies and eighties did not consider themselves as old yet⁵³. A comparative study between German and American middle-aged and older adults found that the subjects tended to feel younger

⁵¹ In addition to the body of research conducted in 2004 for this thesis, other recent Scottish oral histories specifically involving older people in urban Scotland include: CSV Community History Project and Silverlea Day Care Unit, "Hard Graft", in *A Patchwork of Memories* (1996); Living Memory Association, *Edinburgh Lives: People's Memories in Their Own Words* (1999); J. Murray, and D. Stockdale (eds), *The Miles Tae Dundee: Stories of a City and its People* (1990); and A. Smith, *Women Remember: An Oral History*. (1989).

⁵² M. Cowley, *The View From 80*, (1976), p. 9.

⁵³ P. Thompson, et. al., *I Don't Feel Old*.

than their actual age; the bias toward youthful identities was markedly stronger at older ages.⁵⁴ Such findings are an indication of how a greater number of older people have begun to perceive 'oldness' on the basis of their personal experiences rather than in relation to chronological age or a prescribed group image. The emphasis on personal experience and relativism in the literature is an important consideration, as many of the older people interviewed in Scotland also commented to the effect that: 'the date on the calendar does not correspond with the age you feel in your head'.⁵⁵ This subjective dualism provides the basis for self-identity among older age cohorts in recent times.

In terms of group identity, older people's wider range of definitions of old age in the present reflects a different set of expectations from those in the past. Addressing this dichotomy, a participant in the 2004 oral history project observed: 'After the war old age [was still] regarded as the end of the book. Nowadays they don't regard old age as being inevitable. All the improvements in medicine have had affect on how people regard old age. [Also] it's the change in the attitude not simply in [older] people themselves but in how other people regard them'.⁵⁶ The latter point of an overall shift in attitudes was expressed in several ways in the oral history project, generally driven by experiences in the life course. Firstly, each age cohort born after 1900 had greater expectations for their old age; however, differences were significant between cohorts. For instance, the cohort, who were young children during the Second World War, tended to expect more in terms of quality of life, health and status, than the older cohort of men and women whose quality of life had markedly improved since the interwar and war years. Secondly, because

⁵⁴ G. Westerhof; A.E. Barrett; and N. Steverink, "Forever Young? A Comparison of Age Identities in the United States and Germany", *Research on Aging* **25:4** (2003). In a recent Finnish study of the age cohort born in 1910, most of their respondents said they had only crossed the line into old age as they approached their nineties. R.L. Heikinnen, "The Experience of Ageing and Advanced Old Age: a Ten-Year Follow-Up", *Ageing and Society* **24** (July 2004).

⁵⁵ *Interview with Margaret Myles*, Edinburgh, (25 May 2004).

⁵⁶ *Interview with C.C. Goulesbrough*, Edinburgh, (27 May 2004). It is worth pointing out that Mrs. Goulesbrough referred to older people in terms of 'they' and 'them', although she was eighty-four at the time of the interview. This was a common experience when conducting these interviews, excepted only when the respondent was either quite ill or well over the age of ninety.

a greater number of the population has reached a full old age in the modern period, respondents referred to more flexibility in roles and opportunities available over a longer period of time as an older person. This demographic change posed a problem for a few. Men articulated some trepidation about a role that many of them had not expected to attain; for the most part, their fathers and grandfathers had not lived past their fifties.⁵⁷ Thirdly, while most of the interviewees strongly emphasised their independence, a significant number stressed a great desire to be far more involved within the family. The role of grandparent emerged as a dynamic identity, quite distinct from the care-giving duties undertaken in the past. Because expectations of old age varied so greatly between cohorts and individuals within the same cohort, subjective questions concerning ‘oldness’ and the onset of old age failed to produce a consensus among older people in a variety of studies. Contrastingly, objective components of old age as a group identity predominated the oral histories, and were specifically addressed in terms of social benchmarks in the life course.

The challenge associated with change and loss in the latter decades of life was a recurring theme in sources obtained from the post-war period leading up to the recent past. Understood to be natural phases and transitions in the ageing process, specific examples reveal a synthesis of biological, sociological, and psychological functions⁵⁸; taken from over an extended period of time, certain patterns as well as divergent life

⁵⁷ This pattern was more typical among working-class men. For instance, John Rice’s father died in 1942 of lung disease in his late forties as a result of working for thirty years in jute mills. A selection of the men who participated in these interviews include: *Danny Atkin*, Edinburgh (1 May 2004); *Bob Barks*, Dundee (10 May 2004); *Mr Forsyth*, Edinburgh (26 May 2004); *Ronaldo Massimo*, Edinburgh (27 May 2004); *William O’Shaughnessy*, Dundee (8 July 2004); *John Rice*, Dundee (20 July 2004); and *Ron*, Dundee (15 July 2004).

⁵⁸ These have been theorised in America from an interdisciplinary perspective within a framework incorporating the themes of life events, loss, and identity in old age. Over a thirty-year period, some of these are: B. L. Neugarten, *Personality in Middle and Late Life* (1968); D. F. Hultsch and J. K. Plemons, “Life Events and Life-Span Development”, in P. B. Baltes and O. G. Brim Jr., eds., *Life-Span Development and Behavior* (1979); D. P. McAdams, “Unity and Purpose in Human Lives: The Emergence of Identity As a Life Story”, in R. A. Zucker, A. I. Rabin, J. Aronoff and S. J. Frank, eds., *Personality Structure in the Life Course* (1992); R.A. Neimeyer, ed. *Death Anxiety Handbook* (1994); P. T. P. Wong, “Meaning of Life and Meaning of Death in Successful Aging”, in A. Tomer, ed., *Death Attitudes and the Older Adult* (2000); R.A. Neimeyer, ed., *Meaning Reconstruction & the Experience of Loss* (2001).

course experiences emerge. Although the case studies will be interpreted chronologically, it must be understood that most of the examples operate as unifying experiences throughout the period. In the immediate post-war years, the experience of widowhood in old age represented a rite of passage for the surviving partner; the loss of a husband or wife was seen as a signpost for the arrival of deep old age. This was articulated in correspondence between two Scottish family members in 1950.⁵⁹ In one of the letters addressed between an aunt and her recently widowed nephew, the loss of his wife at the age of 63 was the subject. ‘The long dark nights are dreary and lonesome when you are on your own...be brave for you will be called to join her in God’s good time...when you can, get busy on it...’.⁶⁰ Such pragmatic admonitions as these were typical in contemporary Scottish references to bereavement; the loss of a marriage partner and companionship in old age was taken for granted. Similar attitudes were stressed in personal reflections on the loss of physical and intellectual powers in old age. In A.S. Neill’s letter to Willa Muir⁶¹, novelist and wife of poet Edwin Muir, wrote frankly about physical loss in old age: ‘I have found that illness shows a gradual diminution of hold of life... [Old age is the] death of the body when the energy and love of life is still strong’.⁶² He concluded this passage with the message that although ‘there is much lost in old age, there remains much to live for’.⁶³

Modern sources address the theme of loss differently, in that many older people are not content with a ‘gradual diminution’, and express deep regret for the loss of coordination and skills. A review of the material obtained from the oral histories provides a good indication that many of the physical losses experienced in old age were

⁵⁹ This letter was in a collection of papers privately kept by Lucinda Fox, a former librarian for Gillespie’s Girls’ School and an interview subject in 2004, who has in the interim passed away herself.

⁶⁰ L. Fox, Private Correspondence (19 March 1950).

⁶¹ A thoughtful biography of Willa Muir is in W.W.J. Knox’s collection of Scottish women’s biographies: *Lives of Scottish Women: Women and Scottish Society, 1800-1980* (2006).

⁶² A.S. Neill, Letter to Willa Muir (12 August 1959), (MS38466/G/8/N3). Neill’s autobiography is a useful piece considering the ageing process from a personal perspective. A.S. Neill, *Neill! Neill! Orange Peel: A Personal View of Ninety Years* (1972).

⁶³ A.S. Neill, Letter to Willa Muir (12 August 1959), (MS38466/G/8/N3).

most difficult to come to terms with. In an interview conducted during a group art activity at a day centre in Edinburgh, an eighty-five year-old woman interrupted her flow of conversation about the changes in family life in Drylaw Parish to share how useless many older people feel: ‘...when they cannae [even] use a pair of scissors...We were very competent...we get frustrated and clumsy in old age’.⁶⁴ The loss of specific skills often resulted in the loss of independence. Among all the interview subjects who had owned an automobile, the loss of the privilege of driving was significant. A sense of dependence resulting from this transition was often communicated.⁶⁵ Equally emotive were comments reflecting the passage of time, and the sense that time was lost as a result of the sheer physical effort required to undertake everyday living. Most of the participants reported the length of time it took to get up and ready in the morning, the problem of simple tasks taking longer than expected, and that so many hours of their days were lost as a consequence. A retired civil servant recovering from by-pass surgery noted: ‘I don’t know where the time goes, but I am no sooner out of bed in the morning than I am ready to get back in, in the evening’.⁶⁶ The general experience of the elusiveness of time⁶⁷ underscored the consciousness of old age. Although changes and losses were understood to be significant components of the ageing process, a similar emphasis was placed on the importance of learning to make adaptations.

In the interest of answering the question of what adaptive processes older people employed to resolve the challenges they faced in old age, participants in the Scottish oral history project provided a wide range of answers. An analysis of these empirical findings must, however, first be contextualised with a brief overview of the progression of

⁶⁴ *Interview with Mrs. Hall*, Edinburgh (1 May 2004). N.B. On the occasions when interviewees mixed dialect in their speech patterns, attempts have been made to retain the Scots spellings and syntax.

⁶⁵ A deep sense of loss was evident in a number of the interviews. One interviewee emphasised this point so much that more than an hour of the two-hour interview was devoted to her feelings concerning her absolute loss of independence. *Interview with Elizabeth Ross*, Edinburgh (26 May 2004).

⁶⁶ J. Miller, Personal correspondence with author, (10 June 2004).

⁶⁷ An interpretation of the contraction of time in old age has been argued from an anthropological point of view. H. Hazan, “Continuity and Transformation Among the Aged: a Study of the Anthropology of Time” *Current Anthropology* **25:5** (1984).

theoretical discourse from the past forty years concerning a good old age. Strategies for coping in old age have been defined as a function of successful ageing.⁶⁸ Prevailing theories developed in this regard can be analysed in four progressive stages: Firstly, successful ageing was understood to involve a gradual withdrawal; secondly, older people were understood to age most successfully when fully participating in activities; thirdly, success in old age was viewed as a continuity from middle age, and thus from a life course perspective, older people engaged in a lifestyle directly correlated with their past; and lastly, successful ageing was considered in terms of empowerment and self-actualisation.⁶⁹ An interpretation of these theories on a continuum must allow for recent trends such as longer life expectancy, advances in geriatric medicine, overall improvements in quality of life, and social factors over the life course. Conversely, factors outwith the actor's control such as physical deterioration resulting from the demands of work, poor nutrition, and inadequate access to preventative health care must also be taken into account. Successful ageing can thus be defined as a process involving adaptive strategies, determined by the individual's subjective life experience.

An evaluation of the adaptive strategies employed by older people over the past fifty years reveals a correlation between contemporary trends and personal choices. In the post-war period, the prevalent view of the ageing process was fairly homogeneous. The sources suggest that older people in Scotland were expected to be far more content with the physical changes associated with old age, and thus to adapt with a positive attitude. Socialised adaptations such as these were often expressed with humour. In a

⁶⁸ The term 'successful ageing' is often attributed to R.J. Havinghurst, who used the term in his conceptual article about the ageing process: "Successful Aging", *The Gerontologist* **1:1** (1961).

⁶⁹ Key sources representing these theoretical approaches over time are: E. Cumming and W. E. Henry, *Growing Old: The Process of Disengagement* (1961); B.W. Lemon, V.L. Bengston, and J.A. Petersen, "An Exploration of the Activity Theory of Aging: Activity Types and Life Expectation Among In-Movers to a Retirement Community", *Journal of Gerontology* **27:4** (1972); R.C. Atchley, *The Social Forces in Later Life: an Introduction to Social Gerontology* (1972); J.M. Erickson, E.M. Erickson, and H. Kivnick, *Vital Involvement in Old Age* (1986); and B.J. Fisher, "Successful Aging and Life Satisfaction: a Pilot for Conceptual Clarification", *Journal of Aging Studies* **6:2** (1992).

poem Willa Muir wrote in 1947 for her husband's sixtieth birthday, she comically portrays old age as a process to ease into:

I hope that old age makes me merely comic,
A funny, fat old woman with false teeth,
That click or treacherously clack together,
And bosom bursting from a straining sheath,
Vast hips and creaking knees and hobbling feet
Enveloped in a merciful skirt and cloak,
A shameless old grey head, and mounted on it
Some foolish trifle of a hat or bonnet
Or even- God be good to us- a toque!
I was not born to be a comic figure,
But life has changed me into one at last.
I hope, my love, you will not find me tedious
Although my double chins are doubling fast,
And until I die find merriment in me;
But when I'm dead among the elementals
I hope you will forget the accidentals
Remembering rather what I meant to be.⁷⁰

Although Muir successfully articulates the point that humour is an effective adaptive process⁷¹, she herself conforms to stereotypes of graceful ageing as an adaptive function. A modern critique of the overemphasis on ageing gracefully provides insights as to how this process has evolved over time. Professor Pat Thane observed in a Radio 4 documentary on old age that there have always been certain stereotypes of how people should look at a certain age. In the past, it was based on the idea of ageing gracefully. In more recent times, another stereotype has replaced those from the past, such as if a person does not dye their hair, have cosmetic surgery, dress the same as younger people, then there is something wrong with them.⁷² The latter concern with a youth-centred approach to adapting to old age was addressed from a slightly different perspective

⁷⁰ W. Muir, Poem, in P.R. Mudge, "A Quorum of Willas: Another Look at Willa Muir", *Chapman Scotland's Literary Magazine* (1992/3), p. 2. It is notable that Muir's humorous portrayal of an older woman preceded the far more famous poem, "When I am Old I Will Wear Purple" written by Jenny Joseph by more than a decade.

⁷¹ Without exception, every interview subject in 2004 was aware of how important it was to be able to laugh, and to retain a sense of humour in old age.

⁷² P. Thane, "Current Affairs: When I'm 64", *BBC Radio 4* (13 July 2000). http://news.bbc.co.uk/1/hi/english/static/audio_video/programmes/analysis/transcripts/64.txt Thane's views are moderately more critical than Andrew Blaikie's in this regard, in that he sees these changes as a sign of progress, rather than as a long-term pattern of ageism and stereotyping.

among older women interviewed in Scotland. For a majority of these women, respectability and keeping up appearances by means of their dress was an imperative. Reasons for remaining up to date with fashion and making an effort to look their best had more to do with self-esteem⁷³ and pride⁷⁴ rather than a negation of ageing as such. A conscious decision, retaining personal standards in old age was an important adaptation to the ageing process. While psycho-social practices such as these were significant in terms of adapting to the physical appearance of old age, physical and intellectual activity were often cited as the most important constituents of successful ageing.

An outcome of the outpouring of studies incorporating geriatric health, activity, and cognition, is a shift from passive to active ageing in theoretical discourse. In the past three decades, a vast body of literature in the medical sciences and field of psychology has conclusively linked attitudes and cognitive capabilities with physical and mental activity in old age. Many address these areas of study from a life course perspective, associating cognitive performance in old age as a continuation of mental activity and an engaged lifestyle. A useful longitudinal study was undertaken by the ESRC, in which participants were drawn from a study of middle-aged people living in Paisley and Renfrew conducted thirty years ago. Professor Gilhooly *et al* made two important conclusions concerning quality of life and cognitive functioning in old age. Firstly, those who rated their current physical health as good or excellent performed better on tests assessing abstract cognitive functioning; and, secondly, most of the older people in the study expressed the view that keeping active, interested, reading, doing puzzles,

⁷³ A longitudinal psychological study of the management of self-esteem is interpreted on the basis of the older actor's development of identity. P.G. Coleman; C. Ivani-Chalian; and M. Robinson, "Self and Identity in Advanced Old Age: Validation of Theory Through Longitudinal Case Analysis", *Journal of Personality* **67:5** (1999).

⁷⁴ A resident in Morningside, Edinburgh, Margaret Myles referred to medical forms querying whether the older female patient made the effort to look after herself and whether she took pride in her appearance. *Interview with Margaret Myles*, Edinburgh (25 May 2004).

socialising and keeping healthy could prevent decline in old age.⁷⁵ The latter findings in their study concerning active ageing were most salient in the 2004 oral history project in the Central Belt. Connections between ageing, adaptations and lifestyle were articulated by a former Dundee jute mill worker in her eighty-third year:

You've got to keep yer mind and body active. When I first lost my husband, I didnae go out because we always did everything together...I was quite happy where I was, but I wasnae well, not really. The doctor said I must get out. [The family] got all together and found a sheltered housing complex. Then I started coming here [Five-Ways Age Concern day centre] four years ago. I never want for activities now....⁷⁶

An example of the importance of mental and physical activity, Mrs Wilke's experience is representative of many people who had to adapt to the ageing process by actively integrating new pursuits into their lifestyle. Subjective features of the phenomenon of ageing coupled with identity formation in old age underscore broader social roles and status within society as a whole.

Operating as a catalyst for group identity, British Welfare State policies in the post-war period formalised older people's roles in society with the introduction of Old Age Pensioner (OAP) benefits and services. Because OAP status is historically bound up with welfare state legislation, the relationship between the state and the older individual has been argued on the basis of contemporary debates about citizenship. Firstly, the democratic concept of the senior citizen⁷⁷ as an actor worthy of respect and consideration is central to the construction of the OAP as an identity group. The

⁷⁵ K. Gilhooly; L. Phillips; and P. Hanlon, "Quality of Life and Real Life Cognitive Functioning", *ESRC Society Today* (L480254029).

http://www.esrcsocietytoday.ac.uk/ESRCInfoCentre/Plain_English_Summaries/LLH/index151.aspx?ComponentId=9594&SourcePageId=11772 [Accessed 30 July 2007].

⁷⁶ *Interviews with Diana Wilke*, Dundee (13 July 2004 and 6 February 2005). Mrs Wilke was one of the most engaged members at the day centre, and when not busy participating in one of the club's sponsored activities, she could be seen playing 'Patience', reading, dancing, or talking with her table group.

⁷⁷ Population ageing has produced a new socio-demographic category, "senior citizens", whose interests and rights are not adequately provided for in existing legal frameworks, which mostly predate the full-scale emergence of this population group. Approaching the concept of senior citizenship in terms of social solidarity and social dignity, the appellation "senior citizen" has been broadened as a framework for human rights in the literature. G. Ben-Israel and R. Ben-Israel, "Senior Citizens: Social Dignity, Status and the Right to Representative Freedom of Organization", *International Labour Review* **141:3** (2002).

tenuous application of this status in common vernacular in the United Kingdom correlates to the larger problem of a lack of respect for the elderly within society.⁷⁸ In the 1960s, Jeremy Tunstall interpreted older people's status accordingly: 'There is no automatic respect paid to older people, but the most respected and powerful people in our society are often quite elderly'.⁷⁹ Tunstall's analysis raises questions as to whether or not the label OAP has provided older people with a source of respect, and hence status. A review of recent sources in the media and on the internet reveals massive contradictions in this regard. While some sources refer to the OAP with respect, many others discuss old age pensioners in terms of pension crises and their vulnerability.⁸⁰ As a counterpoint, such prominence in the media and social discourse suggests that older people are in a stronger position as OAPs, if only by virtue of becoming increasingly visible and a permanent fixture on the political agenda. Secondly, the construction of a group identity based on its relationship with the welfare state raises important questions concerning the rights of citizenship. Co-founder of the University of the Third Age, social historian Eric Midwinter's argument is that older people should be treated as citizen pensioners rather than welfare beneficiaries, and their income should be looked on as a wage of retirement.⁸¹ Midwinter's premise concerning citizenship and status in the welfare state raises further questions concerning older people's individual responses to statutory policies in recent times.

The status of the old age pensioner in modern Britain can be examined by means of analysing specific government benefit policies and older people's use of public transportation. Over the period, transport services have been increasingly subsidised by the government, to the effect that in recent years, most OAPs travelled for free in their

⁷⁸ Recently, the term senior citizen has emerged in place of OAP in Great Britain. However, like OAP, it is often a euphemism for a welfare state beneficiary.

⁷⁹ Tunstall, *Old and Alone*, p. 256.

⁸⁰ Staff, "OAP Hurt as Bag Snatcher Wrestles Her to Ground", *Edinburgh Evening News*, 5 March 2007.

⁸¹ E.C. Midwinter, *The Wage of Retirement: The Case for a New Pensions Policy* (1985).

council.⁸² Numerous interviews with Stagecoach staff and regular bus users in Fife revealed how policies on behalf of the OAP empowered them by providing them with greater access to travel and more independence. This can be viewed as an important step towards providing older people with certain rights and privileges as older citizens.⁸³ Drivers and passengers expressed how proud they were to possess and use their pensioner card. 'I can go anywhere now. I can see family every week when I used to only see them once in a while'.⁸⁴ Similarly, regular bus services facilitated shopping excursions which would otherwise have resulted in far more dependence on a family member or friend. The general feeling was that older passengers had 'earned' the rights and privileges associated with subsidised or free transport for old age pensioners. 'The right to travel for free after a lifetime of work is only just', one driver commented.⁸⁵ While there was agreement that the opportunity to travel for free was a right as an older citizen, very few older people elected to make use of the seats allocated for older people at the front of most buses. As a general rule, the seats on buses and trains reserved for the elderly, disabled, and parents with prams tended to fill up last. On very few occasions did older people use these seats by choice. When asked about this, the general consensus was that those seats were for the disabled, and the 'very old'. The refusal to enjoy specific privileges as older citizens reveals a conflict between public and private applications of status in old age⁸⁶.

⁸² While preparing this thesis, new legislation has been passed in Scotland and in England, allowing older people even more access to free travel throughout the country.

⁸³ Recent formal studies of statutory benefits, transport services, and their impact on Scottish people include: Scottish Consumer Council, *A New Route: Views of Local Bus Services in Scotland* (2000); N. Crafts, *High Quality Public Services for Scotland* (2004); and National Consumer Council, *User Power: the Participation of Users in Public Services* (2004).

⁸⁴ *Interview with Aggie Stewart*, Dundee (July 2004).

⁸⁵ The Stagecoach drivers politely requested that they and their passengers remain completely anonymous. Informal interviews on various branches of public transport, including taxis, bus, and rail were conducted in the period 2004-2006.

⁸⁶ The conflict resulting from the invention of OAP status and the introduction of statutory services for older people has been explored by means of linking the sense of self, identity and public policies as meaning-making parameters affecting older people. J. Hendricks, "Public Policies and Old Age Identity", *Journal of Aging Studies* **18:3** (August 2004).

The invention of OAP status has been paralleled by tremendous growth in the family role of the grandparent in the modern period. Because the majority of research on grand parenting is relatively recent, understandings of these roles reside primarily among older people themselves.⁸⁷ Recollections within living memory reveal a shift from a familial role based on duties and obligations to one based on factors such as personal satisfaction and fulfilment. A selection of literary sources and oral histories collected over the past few decades illustrates this transition. In one of the most thoroughly researched oral history collections in Britain, Paul Thompson found many instances of grandparents in the first half of the twentieth century whose relationships with their grandchildren, albeit supportive and loving, were more formal, and often quite daunting. A striking example of this was a granddaughter's memories of her Kilmarnock grandmother. She was described as 'a tough old tartar of a truly grim disposition'.⁸⁸ The sense of emotional distance between older and younger generations was often cited in terms of household status. Grandfathers were respected, yet often left alone to sit in their chairs by the fire.⁸⁹ Markedly formal relationships among grandchildren and their grandparents in the past were reported in the 2004 oral history project. A vibrant grandmother of four explains the changes she has observed in the past eighty years:

[There's] not so much formality at present, because things have relaxed from that time to now when grandparents are more relaxed with the children and so on. Well, in most families that is the norm, that grandparents are welcome [and] there aren't the rigid sort of rules nowadays. They bend a little, you have to, or they break... it is more relaxed, and therefore more enjoyable. None of my grandchildren is frightened of me!⁹⁰

⁸⁷ A few pieces of recent research in this nascent area include: P.K. Smith, "Grandparenthood", in *Handbook of Parenting, vol. 3: Status and Social Conditions of Parenting* (1995); D. P. Waldrop *et al.*, "Wisdom and Life Experience: How Grandfathers Mentor Their Grandchildren", *Journal of Aging and Identity* **4:1** (March 1999); and G.O. Hagestad, "Adult Intergenerational Relationships", *Generations and Gender Programme: Exploring Future Research and Data Collection Options* (2000).

⁸⁸ P. Thompson, *et.al.*, *I Don't Feel Old*, p. 75.

⁸⁹ CSV Community History Project and Silverlea Day Care Unit, "Hard Graft", in *A Patchwork of Memories* (1996), p. 3.

⁹⁰ *Interview with C.C. Gouldesbrough*, Edinburgh (27 May 2004). Mrs. Gouldesbrough's house was a testament to the fact that she loved being a grandmother. An entire room was set aside for visiting grandchildren, and the bathroom was filled with many more objects appropriate for small children rather than an older person. A significant number of women who had a room to spare had child-centred homes like this.

The rewarding experience of forging warm relationships with grandchildren was quite evident. Expectations for more dynamic roles as grandparents have penetrated children's songs and literature, vital forums for establishing social norms. Amusing titles such as *You Canna Shove Yer Granny Off a Bus*⁹¹ and *My Granny Was a Frightful Bore (But Isn't Anymore)*⁹² signify modern developments of wider varieties of active roles as grandparents; they are viewed as playful, affectionate, and kindly. The importance of grandparenting in the life course remains to be further examined within the context of historical norms and demographic transitions in the modern period.

From an historical standpoint, public and private roles in old age have been in transition throughout the twentieth century. A widening gap between expectations of old age versus the experience suggests that ageism and stereotyping remained fixed in the collective social psyche. Thus, while polarised perceptions of older people persisted in various sources, individual understandings of a set of roles progressed. There were a few notable exceptions. Some special relationships which an increasing number of older people took part in such as grandparenting evolved: perceptions of this period of time were articulated in terms of fulfillment. Such views are far more flexible than those in the past. Postmodern definitions of private roles in particular were useful because a large and swift increase in numbers of older population groups raised new questions about what it meant to be old.

⁹¹ *You Canna Shove Yer Granny Off a Bus* is a popular traditional Scottish street song, conveying status for maternal grandmothers in an amusing manner. <www.electricscotland.com>

⁹² N. Newman, *My Granny Was a Frightful Bore (But Isn't Anymore)* (1983).

AGEING POPULATIONS AND SOCIAL TRENDS

(2.3)

The demographic effects of a rising proportion of older age cohorts in the twentieth century can be contextualised in terms of an international phenomenon. Like those in the EU, North America, and Australia, increases in Scotland's older population have been paralleled by a decrease in her younger population groups. The ageing of industrialised populations has raised specific questions concerning older people and their families, often in terms of housing arrangements, gender inequality, and modern social trends. To better understand the viability of some of these concerns, a quantitative analysis of Scotland's population patterns and housing policies over the past fifty years will provide the basis for further analysis. Demographic material obtained from British sources provides data for the purposes of making comparisons and conclusions. The integration of this data with qualitative analyses and historical patterns has resulted in separate areas of inquiry. Firstly, what longitudinal forces have influenced Scotland's population over the past hundred years; and, secondly, how have older age cohorts benefited from rising living standards since the Second World War? Given Scottish patterns of migration over the long term and the effect of specific historical events in the twentieth century, numerical increases among older population groups are greater in contrast to other industrialised nations. Social and economic processes coupled with Welfare State policies have resulted in specific population trends affecting Scotland's older populations in the recent past.

Contemporaneous to overall increases in percentage of older population groups in Scotland over the past fifty years, younger age cohorts have been diminishing. Therefore, the examination of older population growth must be set against the transformation of Scotland's population in its entirety. A close study of demographic material from the 1970s reveals a number of twentieth-century population trends. In this

regard, data obtained from the 1971 Scottish census⁹³ is useful for drawing a correlation between key events in the twentieth century, and their long-term influences upon population growth in particular age cohorts. (See Tables 2.1 a/b) In 1971, there were less men and women in the 50-54 than the 55-59 age bracket⁹⁴, a reflection of less births in the period 1917-1922. This was for the most part the impact of the tremendous loss of life in the First World War⁹⁵ and the Influenza pandemic of 1919. An indication of other historical patterns, such as the reduction of family size during the most severe years of economic depression in Britain, c. 1927-1931 and the boom of births in the 1947-1951 period, there are significant peaks and troughs between quinquennial periods before late middle age in the 1971 census. For instance, there were more forty to fifty year-olds than there were thirty to forty year-olds, population change was static between the thirty to forty year-old brackets, and numbers of children had decreased in the teen years and in the 0-4 age bracket. Uneven population growth patterns in Scotland can thus be explained by isolated circumstances such as the Great War in combination with long-term trends, most notably the continuing decline in family size from the 1960s. The latter trend has been attributed to the increased demand for women in the workplace⁹⁶ and the social effects of improved birth control methods, resulting in fewer childbirths. Low fertility rates in recent decades have been the main driver for Scotland's falling

⁹³ GRO, *Census 1971 Scotland* (1975).

⁹⁴ The typical pattern in the British decennial censuses since 1801 has been one peak of population in youth, with a gradual decline in numbers between age brackets, with a more dramatic decline from late middle years into old age. Barring the effects of migration or epidemics, documentation regarding population groups shows that population decline stabilised by middle years. Hence the 1971 census is a useful tool to assess the effect of key events upon population growth throughout the twentieth century.

⁹⁵ J. M. Winter describes the years 1914-18 as the dark ages of British demography, critiquing studies of European population movements in this century which have either ignored the war or dismissed it as unimportant in the long term. J.M. Winter, "Some Aspects of the Demographic Consequences of the First World War in Britain", *Population Studies* **30:3** (November 1976). It can be argued that the population losses sustained during the Great War, along with the subsequent effects of the economic depression and Second World War, accelerated the process resulting in the trend for fewer childbirths and smaller families.

⁹⁶ Recent population surveys and formal studies across the UK reveal the continuing trend for small families. By 2003, the birth rate in the UK had fallen to an average of 1.64 children per woman. The primary reason for this was that women and their partners were choosing to remain childless or to delay the onset of family formation with the view of progressing in their profession. *Population Trends* 111 (Spring 2003), p. 15. www.statistics.gov.uk [Accessed 20 March 2007].

population.⁹⁷ Analyses of declining younger population groups, however, do not fully explain significant proportionate increases within older age cohorts in the period.

One of the most distinguishing demographic characteristics over the past five decades has been longer life expectancy for each successive age cohort. Despite an overall decline in total population in Scotland, there has been a steady increase among late middle-aged and older-aged population groups after the Second World War. This can be explained in terms of better living standards combined with key discoveries and innovations in the medical sciences. Progress in the areas of obstetric medicine⁹⁸, immunization⁹⁹, and nutrition¹⁰⁰ outweighed the factor of smaller families;¹⁰¹ babies born in the UK after 1925 were more likely to reach adulthood than any age cohort born up until then. This has been measured in relation to the presence or absence of adult children among older populations in the last decades of the twentieth century. In a 1978 sample of older people in Britain over the age of seventy-five, 30% had no children.¹⁰² Ten years later, a British family network survey measured a significant improvement; only 16% of men and 15% of women aged 55-69 had no children.¹⁰³ By 1999, the percentage of older people aged 55-69 who had no children was less than 12%; most significantly, less than 5% of those over seventy-five did not have children.¹⁰⁴ Thus, more of the children born to these age cohorts had lived to reach adulthood. Such patterns as these have been attributed almost entirely to medical breakthroughs in the past twenty years.

⁹⁷ Scotland is the only Western European country with a declining population at present.

⁹⁸ For a thorough study of advances made in women's health, see I. Loudon, *Death in Childbirth: An International Study of Maternal Care and Maternal Mortality 1800-1950* (1992).

⁹⁹ Most significantly, the use of antibiotics has saved the lives of millions in Britain since the Scottish scientist Alexander Fleming's discovery and subsequent production of penicillin in the 1940s, which accounts for a greater number of people reaching old age in the modern period. G. MacFarlane, *Alexander Fleming: the Man and the Myth* (1984).

¹⁰⁰ An important factor in childhood health and nutrition was the introduction of free milk and subsidised school dinners resulting from the Scottish nutritionist John Boyd Orr's lobbying in the 1920s and 1930s. J. B. Orr, *Food, Health and Income: a Report on a Survey of Adequacy of Diet in Relation to Income* (1937) and J.B. Orr, *As I Recall* (1966).

¹⁰¹ See J. Ermisch, *Fewer Babies, Longer Lives* (1990).

¹⁰² M. Abrams, *Beyond Three-Score and Ten: a First Report on a Survey of the Elderly* (1978), p. 19.

¹⁰³ OPCS, *General Household Survey* (1988).

¹⁰⁴ National Statistics, *Age Distribution: Families* (2001) <www.statistics.gov.uk> (1 June 2005).

The Scottish Medical Research Council recently reported that between 1981 and 2001, the mortality rate for men and women below the age of 65 dropped by almost a third. Deaths from all causes among men under 65 fell from 491 per 100,000 of the population in 1980-2 to 340 in 2000-2, a drop of 31 per cent. In women, deaths fell from 285 to 193, a drop of 32 per cent.¹⁰⁵ Although Professor Alastair Leyland, the report's lead author, stressed that an uneven decline in mortality rate in Scotland is due to a concentration of health inequalities in deprived communities, overall figures show progress. Greater survival rates have increased the chances for younger age cohorts of achieving a full old age themselves. The historical analysis of rising survival rates offset by falling birth rates over the past fifty years in Scotland and the rest of Great Britain provides a framework for the discussion of a range of demographic trends among older populations.

¹⁰⁵ Medical Research Council, *Inequalities in Mortality in Scotland* (16 February 2007). <<http://www.mrc.ac.uk/NewsViewsAndEvents/News/MRC003500> >

Table 2.1 *Older Populations by Gender, Age, and Marital Condition, Scotland 1971*

(a) **Males**

<i>Ages</i>	<i>Total</i>	<i>Single</i>	<i>Married</i>	<i>Widowed</i>	<i>Divorced</i>
All	2,514,620	1,197,615	1,225,885	77,950	13,175
45-49	156,960	18,295	134,590	2,295	1,785
50-54	139,610	15,360	119,235	3,605	1,410
55-59	143,170	15,670	119,880	6,365	1,260
60-64	133,710	14,745	108,215	9,710	1,040
65-69	106,625	12,110	80,995	12,850	665
70-74	67,865	7,420	46,575	13,555	320
75-79	39,360	3,960	23,020	12,250	130
80-84	20,490	2,165	9,725	9,005	45
85+	10,415	1,120	3,010	6,265	15

[Source: GRO, *Census 1971 Scotland* (1975)]

(b) **Females**

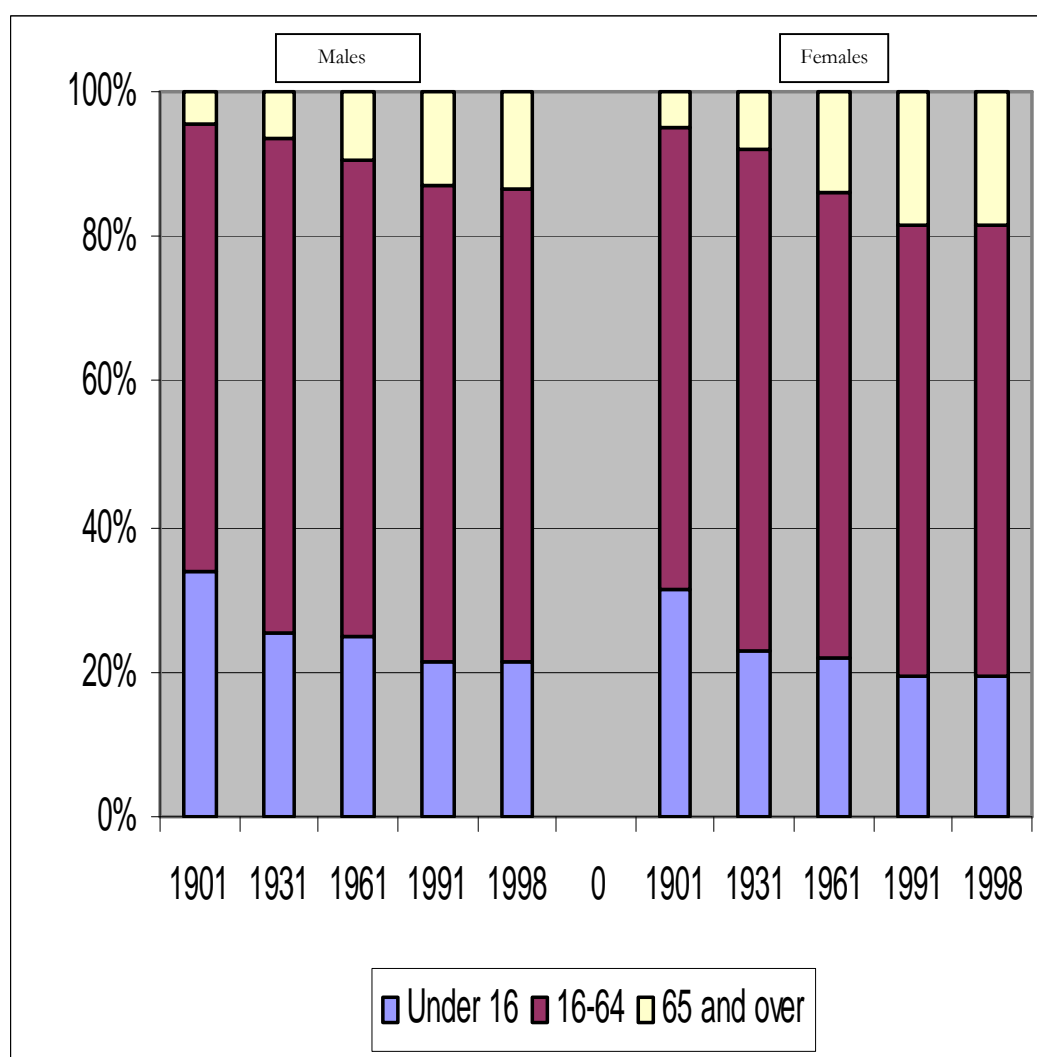
<i>Ages</i>	<i>Total</i>	<i>Single</i>	<i>Married</i>	<i>Widowed</i>	<i>Divorced</i>
All	2,714,340	1,153,765	1,241,770	295,220	23,585
45-49	165,840	18,910	134,875	8,950	3,105
50-54	156,175	18,365	119,560	15,665	2,585
55-59	163,135	21,950	111,860	27,145	2,180
60-64	159,280	26,025	91,575	39,915	1,765
65-69	140,620	26,910	62,445	50,145	1,115
70-74	111,400	22,865	34,915	53,010	605
75-79	75,850	16,720	15,510	43,360	260
80-84	45,070	10,215	5,225	29,510	120
85+	26,760	6,410	1,420	18,890	35

[Source: GRO, *Census 1971 Scotland* (1975)]

Demographic studies of older people in the modern period provide a quantitative basis of comparison and specific data such as population change, household information, and supplemental information pertaining to sections of the population. Indeed, some of the most useful vehicles for interpreting long-term population change has been the decennial census (see Tables 2.2 - 2.4). However, population data such as the census and the General Household Survey, and internet sources such the National Statistics website, have not consistently addressed larger questions about the social experience of ageing, nor have they interpreted the significance of various patterns involved. There has been a tendency for demographic material to be viewed in isolation, which has often led to misrepresentative generalisations about older populations. For example, current emphases on the population profile of pensioners, approximately 18 per cent of Scotland's total population in 2001, are prone to oversimplification.¹⁰⁶ Approaching the quantitative material from an historical perspective, vital sources of data in combination with selected narratives and analyses in the literature reveal several trends. It is significant that many older people's experiences vary by region, to the extent that there are urban/rural divides as well as massive distinctions within different sectors of the same area. Regionalism can be applied to larger social processes of migration and housing. Mirroring the distinctive experiences set by regional differences are the subjective experiences of older individuals, which can be interpreted in terms of class and gender. Family and household configurations have emerged as significant variables within and between older population groups. An historical overview of these demographic patterns reveals vast inequalities, which can be viewed as a process of continuity of socio-economic roles over the life course.

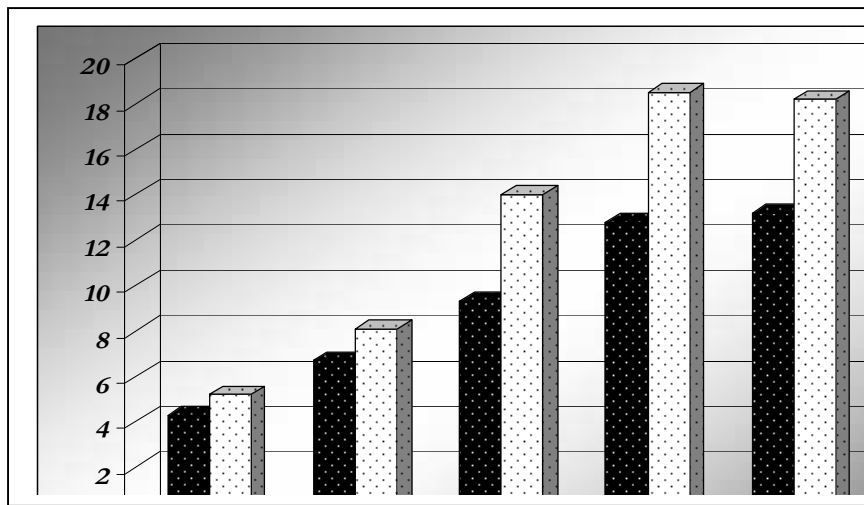
¹⁰⁶ In 1954, R.M. Titmuss challenged the assumption that Great Britain had moved from a normal to an abnormal population structure in the mid twentieth century. He stressed that in a stable population, the normal proportion of people aged 65 and over would be somewhere around 16%, and that contemporary Britain was not an elderly nation, but that Victorian society was extraordinarily youthful. R. M. Titmuss, *Old Age in the Modern World* (1954), p.48.

Table 2.2 *Age Cohorts, by Percentage in Scotland at Selected Intervals, 1901-1998*



[Source: Personal calculations using material from selected decennial censuses have been applied to both tables. BPP, *Census of Scotland*, 1901, 1931, 1961, and 1991. GRO Scotland, *Mid-year Estimates* (1998).]

Table 2.3 *Percentages of Older Populations Aged 65 and Above in Scotland at Selected Intervals, 1901-1998*



Census material obtained over the twentieth-century period reveals two important developments among older population groups. Firstly, growth in absolute numbers of those aged 65 and above in combination with the decline in younger populations has been an uneven process. Significantly, the ratio between older men and women increased significantly in 1961. The widening of the gender gap in old age is a strong indication of lower incidences of premature deaths in the child-producing years, thus allowing a larger number of women to survive into old age. A steadier rise in older male populations suggests that dramatic losses of life in young age during the Great War were offset by improving health standards and quality of life in the twentieth century.¹⁰⁷ Secondly, a careful assessment of figures obtained in the 1998 mid-year estimates indicates that the ‘ageing’ process is levelling off. This finding contradicts most publications discussing the ageing of Scotland’s population and trajectories for the future.

¹⁰⁷ Recent scholarship in the area of medical history has explored longevity, health and disability in old age in terms of influences over the life course. E. Grundy and K. Glasser, “Socio-Demographic Differences in the Onset and Progression of Disability in Early Old Age: a Longitudinal Study”, *Age and Ageing* **29:2** (March 2000); K. Morgan *et al*, “Healthy Ageing in Urban and Rural Britain: a Comparison of Exercise and Diet”, *Age and Ageing* **29:4** (July 2000); and D. Blane, *et al*, “Life-Course Influences on Quality of Life in Early Old Age”, *Social Science and Medicine* **58:11** (June 2004).

Table 2.4 *Age Structure of Great Britain, Scotland, and Selected Scottish Cities, 1991*
Given in Numerical Values and Percentages

Area	45 up to Pensionable Age	Pensionable	Age ¹⁰⁸ & Over	75 & Over		85 & Over	
		Males	Females	Males	Females	Males	Females
Great Britain	10,430,458 (19.26)	3,487,651 (6.44)	6,650,365 (12.28)	1,305,161 (2.41)	2,512,841 (4.64)	200,377 (0.37)	617,379 (1.14)
Scotland	967,123 (19.49)	295,744 (5.96)	605,878 (12.21)	105,694 (2.13)	218,335 (4.40)	15,383 (0.31)	52,102 (1.05)
Dundee	31,524 (19.85)	10,275 (6.47)	21,566 (13.58)	3,652 (2.30)	7,940 (5.00)	492 (0.31)	1,953 (1.23)
Edinburgh	75,445 (18.66)	25,593 (6.33)	55,634 (13.76)	9,663 (2.39)	22,237 (5.50)	1,495 (0.37)	5,822 (1.44)

[Source: GRO, *Census Scotland 1991* (1992)]

By comparing urban figures with Scottish and English data, several themes and areas of inquiry emerge. Looking at strictly national figures, it is clear that older people are proportionately more numerous in England and Wales. Given that Scotland's population has entered into decline, and thus subject to a secondary trend of less childbirths, it must be asked why there are less older people in Scotland in absolute terms. Scotland's urban figures are far more representative of the historical pattern of higher concentrations of all age groups living in urban areas in Scotland as well as the rest of Great Britain. However, it is noteworthy that the age cohort just below pensionable age is proportionately less numerous in Dundee and Edinburgh in comparison to national figures. Edinburgh in particular has less middle-aged populations. Another area of interest within the urban figures relates to gender in old age. Comparing the two cities in terms of how they themselves compare with the gender divide, it can be seen that Dundee no longer has a higher female to male ratio than Edinburgh. Higher concentrations of Dundonian females in the past have been diluted by the effects of massive changes in the industrial landscape; Dundee no longer maintains its status as a 'woman's town' because of the demise of the jute industry.¹⁰⁹ Furthermore, this is a sign of convergence of demographic trends in the urban setting.

¹⁰⁸ Pensionable Age in Great Britain = 65 for males and 60 for females. Consequently, the female figures are significantly larger in the pensionable age bracket than their male counterparts. Similarly, males will be over represented in the 45 up to pensionable age bracket. To accommodate for this flaw, both age brackets have been included to provide an approximate comparison between age cohorts in particular regions.

¹⁰⁹ M. Watson, *Jute and Flax Mills in Dundee* (1990) and W.S. Howe, *The Dundee Textiles Industry 1960-1977: Decline and Diversification* (1982) report the socio-economic effects of the final decades of the Dundee jute industry.

A longitudinal study of Scottish emigration and migration practices in the modern period¹¹⁰ provides a context for the social experience of a growing number of older people living apart from their kin. Examined in terms of regional migration patterns as well as permanent emigration to other parts of the UK and overseas, the tendency for younger Scots to move to obtain work has profoundly impacted this process. The effect of large portions of Scotland's society moving to England and abroad in the post-war period has been documented in contemporary sources from Dundee and the United States. Interpreting emigration as a sign of progress for both younger and older members of the family, a social investigator in Dundee observed in 1979:

Contact with family members abroad broadened [older] people's horizons. One widow, living with two teenaged sons in a two-roomed tenement house stated that her other son was a minor night-club singer in New York. "He comes home to see me every year, but he won't stay here, he gets a room at a hotel. He says he'll take me over there one day".¹¹¹

Fairly typical of the Scottish experience, older Dundonians have been separated from children and grandchildren resulting from high rates of emigration from the city over the past forty years. At the time Jackson reported these observations, approximately forty per cent of families had at least one family member in England, and over thirty per cent of family members in Dundee had relatives abroad, many of whom had settled permanently in the United States. Reciprocal ties with family members and the community back in the parent country have been noted in various oral history sources from Dundee. A selection of retired women who go to the local day centres in Dundee discussed regular phone calls and annual trips to or from North America to see family

¹¹⁰ A selection taken from the early and late modern periods include: S. Murdoch and A. Grosjean, (eds), *Scottish Communities Abroad in the Early Modern Period* (2005); H. R. Jones, *Review of Scottish Population Migration Studies* (1982); and J.M Brock, *The Mobile Scot: a Study of Emigration and Migration 1861-1911* (1999).

¹¹¹ J.M. Jackson, *The Third Statistical Account of Scotland: The City of Dundee* (1979), p. 498. Jackson's reference to the broadening of older people's horizons *viz* the effect of family members migrating to find work, often to places such as Canada or the United States, is a reference to the theoretical concept of living horizons, as the extent of the personally relevant geographical area for a subject. M. Sherif and H. Cantril, *The Psychology of Ego-Involvement* (1947).

members, and a former Timex employee described how her daughter still remained connected to Scotland and her family, despite having lived in California for over a decade.¹¹² An American study in the 1990s examining intergenerational supports for ageing parents in migrant communities found that immigrants maintained consistent ties with their communities of origin, and many remained enmeshed in kinship networks. Most notable about this case study was that many of the immigrants to the New England textile town of Manchester were affiliated with Scotland.¹¹³ Although the sources and literature emphasise the connections between the parent community and new place of residence within the context of a ‘global village’¹¹⁴, the realities for elderly Scots must be considered less romantically. In many areas from whence *émigrés* have left behind family members, older populations make up a larger portion of their communities, and in many cases are left without a primary carer from within the family. Such patterns are even more prevalent among Scottish families who live in separate regions within Scotland itself.

The implications of significantly higher concentrations of older people in Scottish rural areas in recent decades have generally been overlooked as a result of research priorities in urban areas, principally in Glasgow and the Clydeside region. As a corrective, a series of Welsh studies of older people in rural communities over the past two decades has galvanised a new research agenda in the Scottish Executive.¹¹⁵ Migration patterns in Scotland have been vulnerable to push-pull factors determined by

¹¹² *Interviews with Bet Park, Maria Anderson, Rose Pike and Winnie*, Dundee (2004) and J. Murray and D. Stockdale, *The Miles Tae Dundee* (1990), p.22.

¹¹³ T. Haraven and K. Adams, “The Generation in the Middle: Cohort Comparisons in Assistance to Aging Parents in an American Community”, in T. Haraven and K. Adams, (eds) *Aging and Generational Relations Over the Life Course: A Historical and Cross-Cultural Perspective* (1996), pp. 274-5.

¹¹⁴ In sociological terms, the global village is at the heart of discourse about contemporary global migration patterns as a force of history.

¹¹⁵ G. C. Wenger’s research over the past two decades has uniquely undertaken various areas of inquiry into the quality of life of older people in rural areas in Wales. The Scottish Executive’s preliminary report on the rural dimensions of ageing indicate that a whole body of research must be undertaken to address these issues and effect policy over the next decade. Scottish Executive, *Scoping Study of Older People in Rural Scotland* (March 2003).

employment and retirement. In the first instance, large sectors of Scotland's youth have migrated to urban areas as a result of 'push' factors in rural areas; few opportunities for higher education or employment outwith the service and travel industries exist for many young people. The long-term effect has been a steady trickle of younger generations leaving older family members behind. However, some of the demographic material in the post-war censuses must be addressed in terms of 'pull' factors. Higher percentages of pensioner households in a selection of rural towns in the Highlands, Borders, Perthshire and Fife reflect an emerging trend of post-retiral migration *to* these areas in the late twentieth century.¹¹⁶ An indicator of the effects of higher rates of home ownership in middle years coupled with better pensions, an increasing number of older people could afford to re-locate to desirable areas. In addition to the more affluent towns referred to in table 2.5, a number of coastal towns, such as St Andrews, and various rural areas also attracted larger numbers of older populations. This has been part of a larger process of counter-stream rural repopulation in Scotland in which incomers are numerically significant but socially insignificant.¹¹⁷ In combination, the 'push-pull' factors of migration have resulted in a large sector of older population groups in areas wherein they are separated from family members and social networks. The peripheralisation of older populations raises important questions about access to resources and services in rural areas as well as in specific sectors of Scotland's urban communities.

¹¹⁶ A. Strathern and P. Stewart, *Minorities and Memories: Survivals and Extinction in Scotland and Western Europe*, (2001). Strathern and Stewart note that many rural areas in Scotland which were traditionally strongholds for Gaelic speakers have been infiltrated by English and lowland Scottish retirees, both often referred to as 'white settlers'.

¹¹⁷ C. Jedrej, *White Settlers: the Impact of Rural Repopulation in Scotland* (1995), p. 9. The most salient of the few Scottish sources in this area are: S. Black, P. Chapman, G. Clark and M. Shucksmith, "The Good Life? Rural Disadvantage and Older People in Scotland" (1994) and M. Henderson and H. Carlin, *Rural Scotland Today Policy Briefing: Older People in Rural Communities* (1997).

Table 2.5 *Household Composition- Percentage of Households With Pensioners in Selected Areas, 1991*

<i>Area</i>	1 Pensioner (%)	2 or More Pensioners (%)
Great Britain	15.08	9.72
Scotland	15.71	8.36
Dundee	17.39	8.50
Edinburgh	16.92	8.33
Melrose	23.56	15.81
North Berwick	23.78	15.23
Dunkeld & Birnam	24.69	12.34
Galashiels	16.83	8.66
Alloa	15.48	8.80
Penicuik	10.62	6.84
Perth	18.36	9.39

[Source: GRO, *1991 Census Scotland* (1992), Pp. 85-97]

Chronic overcrowding and limited amounts of affordable housing were common features of urban life in twentieth century Scotland. The majority of working-class families were crowded into one-room single-end and two-room room-and-kitchen tenement housing for most of the period. In 1961 fifty per cent of Dundee's houses belonged to the corporation¹¹⁸, and more than half of Dundonians still lived in houses with only one or two rooms, and a shared toilet in the stair.¹¹⁹ Such close proximity to family members over the life course demanded much from the individual, and posed special challenges when an older family member was co-resident in the household. In an attempt to ameliorate some of these problems, a combination of government schemes and private ventures were employed after the Second World War.¹²⁰ Slum clearances and re-housing schemes in the post-war period had short-term and long-ranging effects on older people and their families. In the immediate decades after the most intensive re-housing programmes, the removal of younger families from slum areas to new housing estates produced an imbalance of population structure in both areas. The 1961 Social

¹¹⁸ *Dundee Social Survey* (1961), in Jackson, *The City of Dundee* (1979), p. 482.

¹¹⁹ GRO, *Census of Scotland 1961* (1962).

¹²⁰ The 1918 Housing Act (Scotland) did little to resolve housing conditions in Dundee. In 1941, the Town Clerk quipped that it had taken twenty-one years to build 7,681 houses, and that at that rate it would take another fifty years to cope at all adequately with the re-housing of the working population. *Dundee Courier and Advertiser* (2 April 1941), quoted in Jackson, *The City of Dundee*, p. 87.

Survey of Dundee indicates that the old Hilltown area had more than five times as many people over the age of sixty as in Fintry, one of the first post-war housing estates.¹²¹ More than half of the older families in the Hilltown had relatives in Fintry, whereas only 40 per cent had family living locally. A higher concentration of older people was thus isolated from their younger kin, which compelled some to seek residence on the estates themselves. This process was explained by Dr Richardson in his 1964 study of the north-east of Scotland. He found that older people who had moved as a consequence of re-housing schemes tended to feel 'so isolated and found bus fares to town so dear, that they wanted to get back to their familiar haunts in the city centre...With increasing age the tendency is towards greater preference of "staying put."'¹²² Other contemporary schemes throughout Britain resulted in similar results. Peter Wilmott and Michael Young's study of East London families reveals a notable exception to this:

We were surprised to discover that the wider family, far from having disappeared, was still very much alive in the middle of London. This finding seemed to us of more interest than anything we had been led to expect, all the more so when it transpired that the absence of relatives seemed to be as significant on the estate as their presence in the borough.¹²³

The overall effect of the dispersion of family members upon household composition and social structure in such areas was that many family networks were undermined by re-housing schemes. Further attempts to address housing problems in urban areas produced other challenges for older people in the long term.

Analyses of urban decay set against general rising standards of living in the post-war period reveal the long-term effects of successive waves of housing clearances and renewals in various areas throughout Great Britain. Regional differentials reveal distinctive changes to communities and families. In this respect, social gerontologist Chris Phillipson emphasises the value of examining different areas as a means of

¹²¹ Jackson, *The City of Dundee*, p. 489.

¹²² Richardson, *Age and Need*, p. 46.

¹²³ M. Young and P. Wilmott, *Family and Kinship in East London* (1957), Xvi.

contrasting people placed in different economic areas and looking at the way in which communities are transformed through the process of urban change.¹²⁴ A selection of studies¹²⁵ conducted in the post-war era of older people in their communities, such as York, London, Newcastle, Wolverhampton, Edinburgh, and Dundee, indicate the opportunities and challenges posed for individuals when they moved from their immediate community to a new house in old age. Qualitative findings from the 2004 oral history project raised three areas of discussion in this regard. Firstly, the range of housing designed specifically for older people's needs has slowly progressed in the recent past. In addition to council flats, amenity¹²⁶ and sheltered housing¹²⁷ schemes provide rented or owned accommodation in supported houses which are either purpose-built or adapted from existing buildings with added facilities. However, a distinct shortage of affordable purpose-built accommodation has persisted throughout the period. While there have been such forms of accommodation for over a century in Scotland¹²⁸, most homes have only been built in the past two decades.¹²⁹ Therefore, housing stock remained significantly limited and waiting lists were quite long until the very recent past.

¹²⁴ C. Phillipson; M. Bernard; J. Phillips; and J. Ogg, *The Family and Community Life of Older People: Social Networks and Social Support in Three Urban Areas* (2001), p. 254.

¹²⁵ Nuffield Foundation, *Old People: Report of a Survey Committee on the Problems of Ageing and the Care of Old People* (1947); P. Townsend, *The Family Life of Old People* (1957) and Young and Wilmott, *Family and Kinship*; D. Keir, *The Third Statistical Account of Scotland: The City of Edinburgh* (1966); Jackson, *The City of Dundee*; H. Churchill; A. Everitt; and J. Green, "Taken Away from Community: Older People and Sheltered Housing", in Paul Hoggett (ed.), *Contested Communities: Experiences, Struggles, Policies* (1997); C. Phillipson, et al, *Family and Community Life of Older People*; and Dundee Anti-Poverty Forum, *No Room For Dreams: Poverty in Dundee- an Account of People's Views and Experiences* (c.2004).

¹²⁶ Amenity housing includes adaptations which have been designed to make life easier for older people - with features like raised electric sockets, lowered worktops, walk-in showers, and so on. Some have been designed to accommodate wheelchair users. Scottish Development Department, *Scottish Housing Handbook: Housing for the Elderly* (1980), 1.1.6.

¹²⁷ In addition to the constituents of amenity housing, sheltered housing provides further assistance in the form of a warden's service and call system. Scottish Development Department, *Scottish Housing Handbook* (1980), 1.1.6.

¹²⁸ In 1889, the Aged Christian Friend Society was founded, and in 1891, the society built the Colinton [Edinburgh] Cottage Homes, the first sheltered houses for older people in Scotland. <www.acfos.org.uk>. More recent voluntary bodies include Abbeyfield, a society formed in 1956 to provide housing, support and companionship to older people in their local communities. <www.abbeyfield.com>.

¹²⁹ The 1980 *Scottish Housing Handbook* was drafted with the view of making recommendations for future housing policy for the elderly, who had hitherto more typically been cared for by their families. Scottish Development Department, *Scottish Housing Handbook*, 2.2.1.

Secondly, the location of housing for the elderly has proven to be a source of inequality. For the most part, housing for the elderly has been located near some local services; however, the range and quality of these are monumentally diverse. An examination of services and houses surrounding sheltered housing schemes and day centres for the elderly reveal specific problem areas in urban Scotland. An example of this is the extreme deprivation found in neighbourhoods in Dundee and in particular areas of Edinburgh such as those in Craigmillar and Drylaw¹³⁰. As the 34th most deprived ward in Scotland (out of a total of 1,222 wards), Drylaw has suffered from a general lack of many facilities for several decades. Because residents of Drylaw have no access to free ATMs, those who receive their benefits and pensions by direct deposit are specifically penalised. This has provided older people with particular problems. An example of this was reported to the Citizens Advice Bureau:

[One older woman] has to get a bus to get her money out at a free cash machine. She says she is anxious about getting too much out at a time as she doesn't want to risk it getting stolen, therefore she makes the journey two or three times a week. Some of her benefits get paid directly into a bank account and she cannot get access to these without getting charged or by making a bus journey.¹³¹

In addition to the problem of lack of services is the state of the locality itself. Many of the existing shops in Drylaw are situated in a shopping centre which is insufficiently lighted, thereby encouraging criminal activity. Numerous instances of broken street lamps, windows, and signposts, graffiti, drug paraphernalia, chronic litter problems, and damaged storefronts resulting from break-ins provide evidence of long-term decline. A few streets away from the commercial centre, most of the houses are in similar stages of decay. The sheltered accommodation in Easter Drylaw, owned and managed by the City of Edinburgh Council, was in the same poor condition as the rest of Drylaw. The

¹³⁰ The Muirhouse/Drylaw ward in the City of Edinburgh Council has the highest benefit dependency for older people. Lothian Labour Market Unit, *Lothian Labour Market Statement 2005* (2005), p. 70.

¹³¹ F.H. Road, *Out of Pocket: CAB Evidence on the Impact of Fee-Charging Cash Machines* (July 2006), p. 4.

disintegration of the community is emblematic of the greater problem of the 'postcode lottery' between neighbourhoods as well as between specific urban areas.

Lastly, the rationale for moving was an important consideration residing in both extremes of poverty and wealth, and was common ground in the oral histories. A majority of participants from all socio-economic backgrounds moved from their home because they had found it impossible, either financially or logistically, to remain in their former home. Personal reflections about moving brought up the point that moving home in old age is often fraught with difficulties, both emotional and practical. A partially sighted ninety-three year-old former Presbyterian missionary shared the fact that after her move to sheltered accommodation, she felt powerless because she could no longer find her belongings, and that where she lived was no longer her home.¹³² The loss of belongings and safety often associated with such moves was emotionally significant for many of their respondents. Similarly, the loss of a *sense of belonging* was profound. The manager of Strathmore House, formerly an Abbeyfield residence for retired nurses in a very select neighbourhood in Morningside, explained the reluctance to move house:

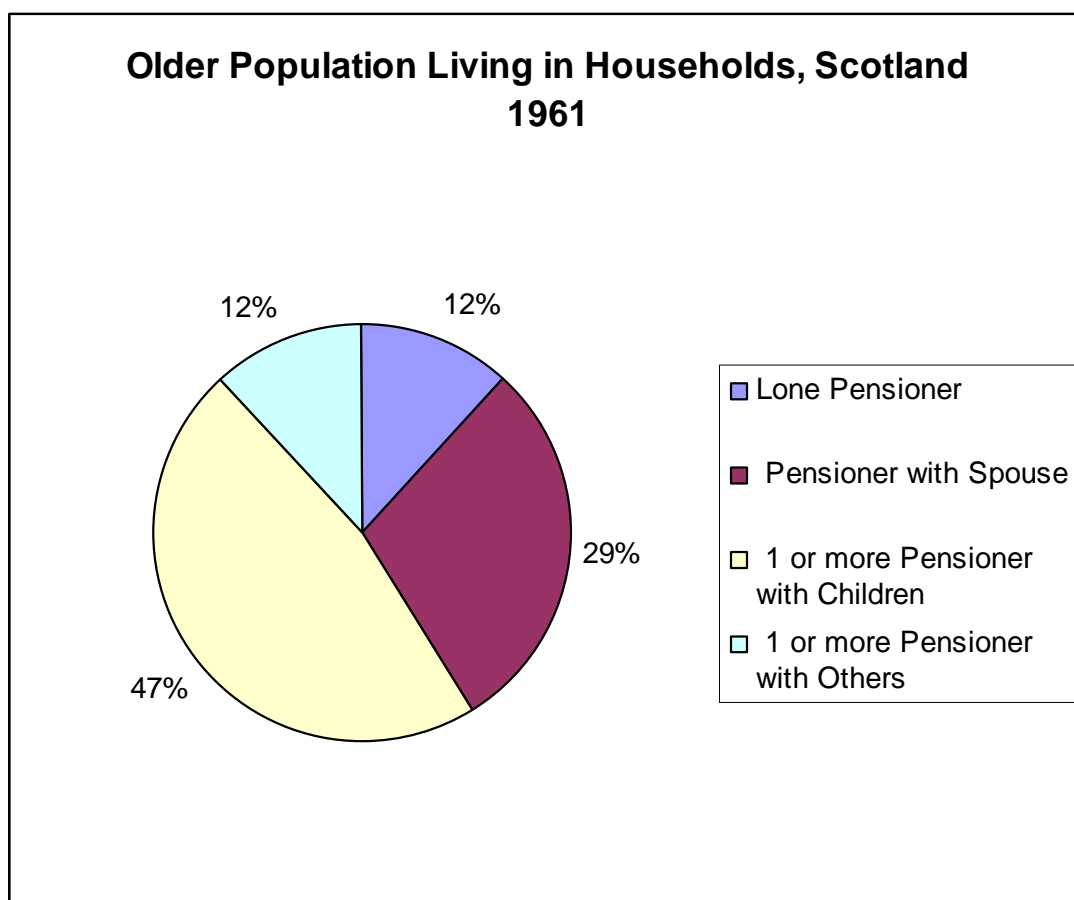
All of the residents of these houses have moved from their family home. They've lost all that was familiar to them, their neighbourhood, most of their friends, and regular contact with family ... the everyday stuff you and I take for granted...while the residents here are very autonomous, they are geographically and emotionally separated from their past.¹³³

Mr Orr's point concerning older people's relocation to an area at a distance from their former neighbourhood illustrates the predominant experience for a growing population group; a significant proportion of older age cohorts in recent decades have had to make appropriate housing decisions for their needs and have tended to live by themselves.

¹³² Interview with Jane Gailey, Edinburgh (25 May 2004).

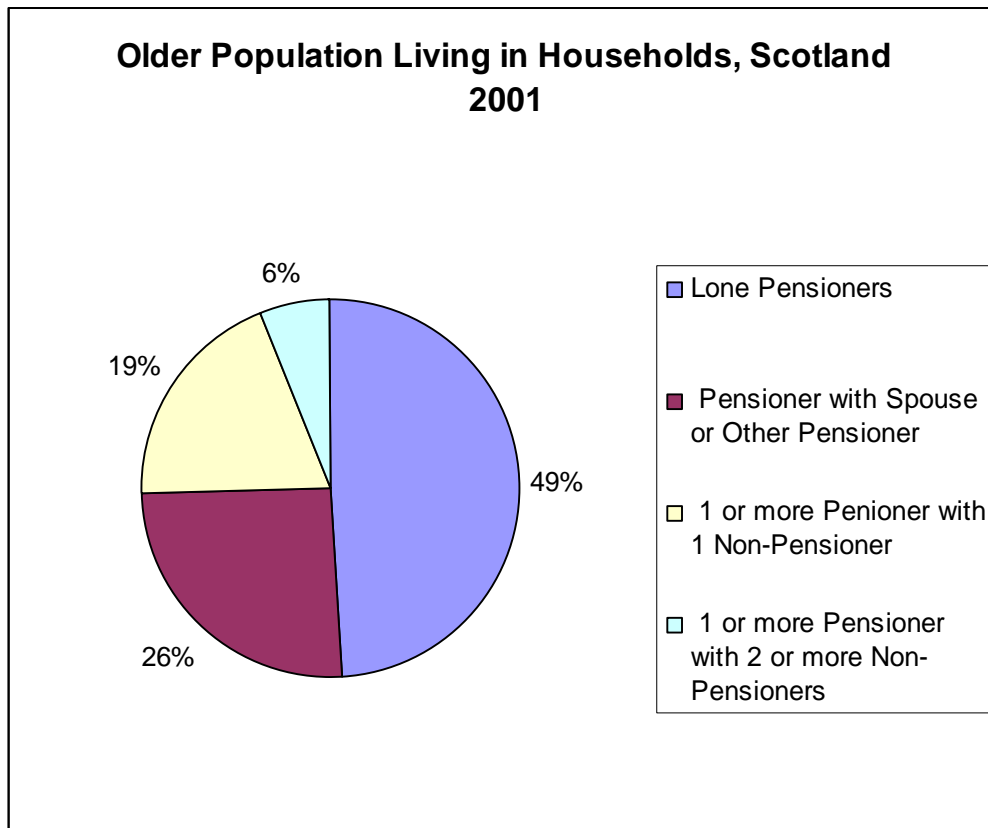
¹³³ Interview with James Orr, Edinburgh (26 May 2004). Peter Townsend observed this in his studies of older couples in Bethnal Green in the 1950s. Townsend, *Family Life of Older People*, p. 38.

Table 2.6: *Pensioner Household Trends in Scotland, 1961*



[Source: Richardson, I.M., *Age and Need*, Chapter 6.]

Table 2.7 *Pensioner Household Trends in Scotland, 2001*



[Source: Raab, G. and MacDonald, C, *Older People in Scotland: Results From the Scottish Household Survey 1999-2002*. Health and Community Care Research Findings No. 37, 2004. Scottish Executive.
<http://www.scotland.gov.uk>]

The living arrangements of older people in Scotland have been profoundly affected by post-war migration patterns and housing schemes in the public and private sector. One of the most important housing trends referred to in the modern period has been the growing rate of older people living by themselves. Formal population studies and household surveys have measured this in on the basis of general figures reporting household occupancy and quite specific data categorising head of household status. A selection of Scottish surveys taken from over a forty-year period reveal a shift away from multiple occupancy and multi-generational households including pensioners to single-headed pensioner households. Dr Richardson's initial study in the 1960s and the 2001 *Scottish Household Survey* illustrate important points in this regard. (Tables 2.6 and 2.7) Household arrangements between generations altered significantly between 1961 and 2001; there has been a tremendous increase in older people living alone in their own homes. In 1961, no more than an eighth of older people lived alone, whereas by 2001, almost half of pensioners did so. The 2001 data indicates nominal differentials in terms of the gendered experience in the period: four times as many older women than men lived alone in 2001, compared to an almost entirely female-dominated experience in the 1960s and 1970s.¹³⁴ The few older men who lived alone did so with the benefit of daughters living nearby.¹³⁵ These patterns were in line with those of Great Britain as a whole in the same period. (Table 2.8) In a study conducted by the Central Statistical Office in 1980, approximately 86 per cent of pensioners who lived alone were female.¹³⁶ Over the past forty years, the number of older women living alone (mainly as widows) has continued to significantly outnumber older men living alone in the United Kingdom.

¹³⁴ G. Raab and C. MacDonald, *Older People in Scotland* (2004) p. 1 and Central Policy Review Staff (CPRS) and Central Statistical Office (CSO), *People and Their Families* (1980), p. 71.

¹³⁵ Richardson, *Age and Need*, p. 61.

¹³⁶ (CPRS) and (CSO), *People and Their Families*.

Table 2.8 *Percentage Living Alone by Age, at Selected Years 1973-1991*
Great Britain

Age Cohorts	1973 (%)	1983 (%)	1985 (%)	1987 (%)	1989 (%)	1990 (%)	1991 (%)
16-24	2	2	4	3	4	4	3
25-44	2	4	5	6	6	7	7
45-64	8	9	11	10	11	11	11
65-74	26	28	29	28	27	28	29
75 and Over	40	47	47	50	48	47	50
All Aged 16 and Over	9	11	12	12	13	13	14

[Source: OPCS. *General Household Surveys*, 1973, 1983, 1985, 1989, 1990, and 1991.]

Parallel to dramatic changes in the living arrangements of older women, men's experiences in terms of housing and status reveal much more continuity over the period. Scottish householder information in 1971 (Table 2.9) indicates that from the age of 65, men were still more likely to be married, and living without children in his household. Contrastingly, the majority of female householders above the age of 60 were typically in households by themselves or with only one other person. A review of the material from the 1971 census concentrating on the practices associated with head of household reveals a distinctive pattern between age brackets. Data taken from the middle years is useful, because it indicates a general trend of 'older' males retaining their status as head of household in Scotland.¹³⁷ It is notable that in middle years, men outnumbered women as head of household by a factor of 6, whereas in retirement, women outnumbered men as head of household. For the most part, the shift in status as head of household is the effect of a rise in number of older women living alone in Scotland. The correlation between gender, longevity and householder trends is quite evident in national demographic studies. Thus, the high incidence of older women living alone is stressed in the literature. However, regional data from comparative locality profiles reveal significant increases in a wider variety of pensioner household formations in the past few decades.

¹³⁷ Comparative studies in Ireland suggest that older men in particular have been increasingly losing household headship in the post-war era. M. Gordon; B. Whelan; and R. Vaughan, "Old Age and Loss of Headship: a National Irish Study", *Journal of Marriage and the Family* **43:3** (August 1981).

Table 2.9 *Scottish Households by Type, Measured in Relation to Head of Household [10% Sample] 1971*

Household Type	Totals, At All Ages	Males, at All Ages	Males, Age 45-64	Males, Age 65 and Over	Females, At All Ages	Females, Age 45-59	Females, Age 60 And Over
No Family	38,468	11,797	4,911	4,344	26,671	5,105	19,955
One Person	31,177	8,226	3,242	3,403	22,951	4,114	17,693
Two or More Persons	7,291	3,571	1,669	941	3,720	991	2,262
One Family	128,918	118,897	46,553	12,270	10,021	3,376	1,349
Married, no Children	35,428	34,245	15,478	10,646	1,183	429	523
Married, with Children	71,909	70,537	25,142	824	1,372	299	41
Single Parent	11,372	5,107	1,622	190	6,265	2,230	639
Two Families	2,405	2,187	1,268	89	218	56	11

[Source: GRO, *Census 1971 Scotland* (1975)]

Unlike households in the period 1845-1945, most Scottish houses occupied by pensioners in the post-war period were neither multi-generational, nor conventionally nuclear. In addition to the more frequently studied trend of older people living alone, several datasets from the 1971 census make evident the emerging practice of non-married pensioners cohabiting in two-person households.¹³⁸ A review of modern census and household statistics reveals two housing trends. Using Edinburgh and Dundee, and their respective county figures as case studies, a more diverse range of household dynamics and patterns are evident. In the county of Angus (in which Dundee comprised the greatest proportion of the population), data tabulations reveal less two-person married pensioner households than of other forms of one and two-person households. In 1971, 6,095 two-person households were composed of married

¹³⁸ GRO. "Households by Families in Urban Areas: Numbers and Percentages, 10% Sample 1971; Persons Over Pensionable Age in One and Two-Person Households by Type of Household, 1971" *Census 1971 Scotland* (1975). Data referred to throughout the passage was compiled from this source.

pensioners, 4,655 two-person households were composed of single pensioners, 2,235 two-person households were composed of pensioners who were not married to each other; and 1,170 of these households were composed of two women, of whom at least one was of pensionable age. The trend of significantly fewer two-person married couple pensioner households in Angus is comparatively unique. Although two-person households composed of unmarried pensioners outnumbered those composed of married pensioners in Midlothian, the difference was only by 295, as compared with the Angus figures, which was 795. In Midlothian (in which Edinburgh comprised the greatest proportion of the population), 5,240 two-person households were composed of married pensioners, 3,625 two-person households were composed of single pensioners, 1,910 two-person households were composed of pensioners who were not married to each other, and 1870 of these households were composed of two women, of whom at least one was of pensionable age. This material suggests that, proportionately, there were more married pensioners in Edinburgh, and a greater variety of pensioner households in terms of family and non-family members in Dundee. The growth in number of cohabiting pensioners and single-headed households in principally urban areas is indicative of contemporary marriage and divorce trends, which have long-term social and economic implications for older age cohorts in the future.

An historical examination of older populations and demographic trends in the post-war period reveals a uniquely Scottish experience. The combination of unusually low birth rates and an upturn in longevity has resulted in a greater proportion of older versus younger population cohorts. A marked rise of older female populations in particular represents a specific demographic change in Scotland significantly greater than those in the UN (table 2.10). However, statistical analyses concerning the ageing of the population must rest on larger patterns which have impacted Scottish society as a whole. Scotland's migration patterns have arguably driven the overall decline in her population,

thereby shaping the social and economic experiences of older people. Higher concentrations of older people in both rural and urban areas have felt isolation from family members, former communities, and a past way of life. Attempts to meet the social and housing needs of a specific population group have often failed to address the central experience of the family in old age. Despite geographical separation, family members remained essential as sources of stability, companionship, and support. These themes will be evaluated at length with respect to the role of gender.

CARING RELATIONSHIPS

2:4

Amidst the complexities of population change and personal development as ageing citizens in the modern period, interpersonal relationships and the role of the family as carers have remained comparatively constant. Although traditional models of intergenerational family structures have changed, this must be seen as an adaptation to the historical and social forces shaping them. The retention of strong family connections between generations is an indication of highly developed social norms still embedded in Scottish society. Familial roles and social practices in old age operate as sources of stability, both in terms of social order as well as for individual family members. Hence, analyses of the family are bound up with understandings of their roles and responsibilities in the community. The nature of discourse concerning the family has intermittently validated and challenged these points, which provides a useful forum for discussion about the unique attributes of Scottish older people and their families. Specific debates concerning gender and caring responsibilities in the modern period reveal a dichotomy between the public and private; ageist attitudes in society collide with an enduring family-centred ethos. Such contradictions raise several areas of inquiry concerning interpersonal relationships in old age. In what manner have modern social trends influenced caring relationships, and how have older people adjusted to these forces? The combined effect of dramatic changes in family and household formation with greater access to a wider variety of social and economic resources in the community has provided the basis for more flexibility in older people's roles and support networks.

Research concerning older women and their caring roles has been prominent in the post-war period.¹³⁹ Determined by a greater number of female population groups in

¹³⁹ L. Botelho and P. Thane (eds), *Women and Ageing*; Glasgow Women's Studies Group, *Uncharted Lives: Extracts from Scottish Women's Experiences* (1983); E. Gordon, "Women's Spheres", in W.H. Fraser and R.J. Morris (eds), *People and Society in Scotland, II* (2000); J. Harrison, "Women and Ageing: Experience and

old age, the literature primarily addresses ageing from a female perspective. While it was correct to interpret older people's roles in the past on the basis of gender, such work proves problematic in more recent decades. Although in the short term the feminist project has immeasurably contributed to historiography by including women's social roles and experiences, the result has been that some male population groups have been silenced utterly. Older men and their roles in the family have thus been generally marginalised in historical analyses. As a consequence, an emerging population group among more recent older age cohorts remains to be included in historical narratives. In an attempt to bridge this historiographical gap a thematic approach will be employed in the interest of integrating older people's family experiences in the modern era. The theme of marriage will be explored to ascertain whether the experience has been affected by modern social trends, and how marriage uniquely functions as a source of companionship and support in old age. Respectively, bereavement and widowhood will be addressed, with the underlying question of how men and women cope with this process in old age. Latterly, the role of the family as social capital will be analysed. The emergence of differentiated kinship networks will be examined as one component of informal caring relationships. Formal sources of care will be addressed in terms of fictive kin, an increasingly vital function in the everyday life of older people in Scotland.

Scottish marriage patterns and family formation have undergone unprecedented transformations in the twentieth century. Most notable has been the swift decline in childbirth rates, thus reducing the size of families. Unlike the nineteenth century when surplus daughters remained unmarried for the entirety of their lives, women in the modern period were far more likely to marry. The virtual disappearance of the 'elderly spinster' is a by-product of this trend. The result is that a majority of women *and* men in

Implications", in *Ageing and Society*, 3:2 (1983); and O. Stevenson, *Women in Old Age: Reflections on Policy and Practice* (1987).

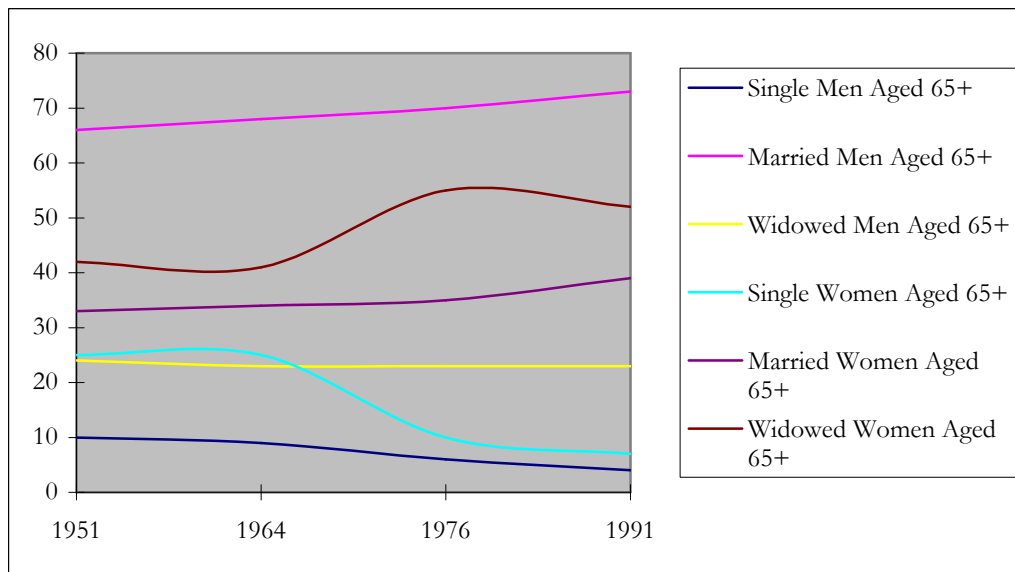
population cohorts born after the Great War experienced marriage and widowhood in old age. The effect of this modern population trend upon marriage in particular can be observed in census data compiled from over a forty-year period. (Table 2.10) The social implications of this are manifestly important, and can be studied on the basis of interpersonal relationships and interdependency. In terms of the former, research findings suggest that happily married older adults maintain better health and higher patterns of cognition.¹⁴⁰ The importance of intimacy and companionship are thus regarded as vital functions of marriage in old age. Because these factors tend to be taken for granted in the literature, formal studies of the qualitative experience of marriage among older people are virtually non-existent in Scotland. Therefore, case studies drawn from a selection of comparative British material and the oral histories in 2004 represent a small sample of the marriage experience. As regards the function of interdependent relationships between older husbands and their wives, there has been a tendency for researchers to stress the imbalance of power in marriage. Analyses overemphasise the economic dependency married women experience, and how men are dependent upon their wives for support and care.¹⁴¹ Material from international medical and psychological studies in more recent decades challenges the predominant 'dependency' model.¹⁴² The dynamics of interdependent married relationships will be explored as a byproduct of the affective components of marriage, resulting in a profoundly vital source of stability.

¹⁴⁰ W. L. Roberts, "Significant Elements in the Relationship of Long-Married Couples", *International Journal of Aging and Human Development* **10** (1979); K.J. Grover, C.S. Russell, W.R. Schumm, and L.A. Paff-Bergen, "Mate Selection Processes and Marital Satisfaction", *Family Relations* **34** (1985); and R.H. Lauer, J.C. Lauer, and S.T. Kerr, "The Long-Term Marriage: Perceptions of Stability and Satisfaction", *International Journal of Aging and Human Development* **31** (1990).

¹⁴¹ J.H. Sheldon, *The Social Medicine of Old Age* (1948); Townsend, *Family Life of Old People*; Young and Wilmott, *Family and Kinship*; and P. Thompson, et al, *I Don't Feel Old*.

¹⁴² T.E. Seeman, M. Albert, T.M. Lusignolo, and L. Berkman, "Social Relationships, Social Support, and Patterns of Cognitive Aging in Healthy, High-Functioning Older Adults: Macarthur Studies of Successful Aging", *Health Psychology* **20:4** (July 2001).

Table 2.10 *Longitudinal Analysis of Marital Status Among Older People in Scotland, 1951-1991*



[Source: GRO, *Decennial Census Scotland 1991* (1992)]

Marriages of long duration have become more prevalent in the twentieth century, the effect of population growth in over-65-year-old male populations and improved life expectancy past middle years for females in industrialised nations. Specific questions concerning the social impact of long-term marriage as an historical phenomenon have been uniquely addressed in longitudinal case studies and the 2004 oral histories. In the first instance, the Older Generation Study, undertaken by the University of California, Berkeley between 1930 and 1985 provides an exceptional body of research concerning the marriage and family experience in old age. Asking whether long-term marriage is a source of continuity or change, social scientists Sylvia Weishaus and Dorothy Field compiled original research obtained at various stages throughout the period. Because they spoke with older couples who had previously reported their feelings about marriage in younger and middle years, they were able to measure a specific cohort's experiences and feelings over their entire life course. Their findings indicate how important long-term marriage was as a source of continuity. Most strikingly, two-thirds of their

respondents reported that their marriages were positive and stable. Half of those stressed that their satisfaction increased after middle age, and became more pleasurable with increasing years.¹⁴³ Specific comments concerning companionship, emotional intimacy, and stability were very similarly addressed in the Scottish study in 2004. A strong exemplar of this was Lucinda Fox's loving memories of her sixty-three-year marriage to her husband, which illustrates the emotional investment involved in long-term marriages:

We got through the war years, raised our children, moved all around the country and faced so many changes together. When I was ill after our last baby was born [and subsequently died], he was there to depend on- I couldn't stand anyone else around me but him... I remember all of the Christmases, weddings, holidays, ... even the every day things...illnesses, and our parents' deaths. The friends that came and went from our old house...and our favourite dog we used to walk together. We had our secrets too, but we had more than a lifetime of knowing each other better than our own selves. I don't have a single memory now without William there.¹⁴⁴

The strength of long-term relationships such as this were often due to compromises made between husband and wife for their mutual benefit. In more recent times, the ability to compromise has provided modern couples with greater flexibility in their roles and the capacity to support each other to greater effect in old age.

Analyses of marriage practices in contemporary Britain reveal a period in social flux. Sources in the immediate post-war period emphasised traditional gender roles, extending into old age. For instance, Peter Townsend described numerous married couples in 1950s London who played distinctive roles within their marriage.¹⁴⁵ Specific expectations concerning social roles and the division of labour between husbands and wives were thus magnified in old age. However, a review of international research and

¹⁴³ S. Weishaus and D. Field, "A Half-Century of Marriage: Continuity or Change?", *Journal of Marriage and the Family* **50:3** (1988).

¹⁴⁴ *Interview with Lucinda Fox*, Edinburgh (14 July 2004).

¹⁴⁵ Townsend, *Family Life of Old People*, chapter 6.

regional case studies reveal two important trends which have impacted older married people in more recent decades. Firstly, because older married couples are less likely to live with or near other family members, remaining socially interdependent has become an imperative. Older couples have reported to various sources, such as household surveys and the census, that their primary source of companionship was their marriage partner. Indeed, married couples visited their family members with far less frequency than those who were single or widowed; older people who lived alone saw family members three times more often than married couples.¹⁴⁶ While older people have learned to rely more upon themselves within their marriage for socialisation, the capacity to do so has required both partners to adapt. Secondly, gender roles and modern marriage practices in Western societies have become far less traditional in recent decades, a reflection of increasing egalitarian attitudes towards gender. This has been addressed in terms of the impact of marital equality upon long-term marriages in hitherto traditional societies. A study conducted for a Social Work department in Israel addresses important areas of difference between older men and women in their power relations and marital satisfaction, an indication that there is a fine balance between equality, satisfaction, and burn out for either partner.¹⁴⁷ This work suggests that there are increasing expectations for older marriage partners to step out of traditional gender roles. The willingness to do so has been illustrated in modern biographical material in the UK. While caring for his wife Iris Murdoch, Professor John Bayley reflected how difficult it was for him at first to take on household responsibilities, as that had been her domain for many years of their married life. However, he lovingly undertook the domestic duties and shopping to the best of his ability in the interest of keeping his wife at home for as long as possible.¹⁴⁸

¹⁴⁶ *Living in Britain 2001* www.statistics.gov.uk (1 May 2005).

¹⁴⁷ L. Kulik, "Marital Equality and the Quality of Long-Term Marriage in Later Life", *Ageing and Society* **22:4** (July 2002).

¹⁴⁸ Bayley has written three books addressing various aspects of his relationship with Iris Murdoch, as well as the impact of her battle with Alzheimer's disease upon their marriage. J. Bayley, *Iris: a Memoir of Iris*

Although many men were reported as having difficulties taking on such responsibilities in the Scottish studies, it was similarly expressed in terms of unfamiliarity rather than anathema with the domestic sphere: “Some men can cope, and some cannae cope”, was one woman’s reflections on her older brother’s attempts to play his part with the household chores upon his retirement.¹⁴⁹ Marriage partners have been seen to take greater responsibility for providing social, emotional, and physical support in old age on more equal terms. The effect of modernising trends such as these upon marriage practices must be viewed in larger demographic contexts in recent decades.

Because married life has been the dominant social experience and source of continuity for older people, recent patterns of separation and divorce can be interpreted as agents of change. Until the post-war period, the incidence of divorce among older age groups was negligible. The rise of divorce rates among younger age groups has slowly influenced older people from the 1970s. In particular, remarriage patterns among older population groups have been ultimately impacted by an increasing number of divorces in middle years. It would appear that just as there were persistent gaps in number between older male widows and female widows in both the nineteenth and twentieth centuries, there was a tendency for less older men to be divorced than women. This reflects a continuing pattern of widowed or divorced men remarrying younger single women. For example, 67,635 men aged 60 and above were classified as widowers in 1971, compared with 234,830 women of the same age group. There were almost four times as many widowed women as widowed men. In terms of divorce, divorced women still outnumbered divorced men above the age of 60, albeit less dramatically. The ratio of divorced older people by gender in 1971 was 3,900 divorced women aged 60+ : 2,215

Murdoch (1998); *Iris and the Friends: a Year of Memories* (1999); and *Widower's House: a Study in Bereavement* (2001).

¹⁴⁹ *Interview with Bet Park*, Broughty Ferry (19 August 2004).

divorced men aged 60+.¹⁵⁰ It is notable that after the age of 65, the gap widened. The effect of divorce rates and widowhood on remarriage practices can be interpreted as an instance of the qualitative differences between men and women in old age. The long-term effects of these trends will only be felt by both men and women in future decades. Regardless of comparatively lower incidences of divorce among older populations at present, the emotional and financial losses associated with divorce in middle to later years can be just as influential as the experience of widowhood.

The range of study concerning bereavement and widowhood over the past few decades is indicative of long-term research agendas and concerns about social and economic isolation. Consequently, the sheer volume of literature in both areas is staggering. In addition to the profound psychological effect and process involved with losing a marriage partner,¹⁵¹ various themes have been researched rigorously in an international *milieu*. One of the more significant areas of research has incorporated various modes of adaptation to bereavement and widowhood within the life cycle. An early study of adaptive processes in widowhood makes these interpretations on the basis of gender. Two areas in particular were emphasised. Firstly, the study reported various coping strategies which were specifically helpful in the first year of bereavement. Widows identified the following such strategies: keeping busy, accepting and articulating strong feelings, participating in groups, learning new skills, owning a pet, praying, maintaining ties to the past, keeping a journal, doing things with family, and going places with friends. What is most striking is that most of these coping strategies tended to be more sedentary

¹⁵⁰ Data obtained from Census Scotland, 1971.

¹⁵¹ Recent research conducted into the psychological factors of bereavement, incorporating both age and gender, includes: G.R. Lee *et al*, "Gender Differences in the Depressive Effect of Widowhood in Later Life", *The Journals of Gerontology, Series B* **56** (January 2001) and A. Erlangsen *et al*, "Loss of Partner and Suicide Risks Among Oldest Old: a Population-Based Register Study", *Age and Ageing* **33:4** (July 2004). These themes are well-represented in trade books which have been published as a vehicle for self-help over the past twenty-five years. Some of the more recent editions include: V. Ironside, *You'll Get Over It: The Rage of Bereavement* (1997); S.J. Zonnebelt-Smeenge and R.C. De Vries, *Getting to the Other Side of Grief: Overcoming the Loss of a Spouse* (1998); and E. Kubler-Ross, *On Grief and Grieving: Finding the Meaning of Grief Through the Five Stages of Loss* (2005).

and typically female in orientation. It was clear that men made less use of these forms of coping, and thus men tended to not make the same use of the social and emotional modes of coping. Secondly, establishing and maintaining interpersonal relationships and other social contacts were understood to be significant methods of adapting to widowhood after the bereavement process. After the loss of a husband, older women were more inclined to seek social support from family, fictive kin, and friends, because socio-emotional support proved to be the most valuable form of support. Contrastingly, men were far more likely to remarry.¹⁵² The importance of social interaction provided older widows and widowers with an outlet for grief and a source of well-being for the long term. Because men and women engaged in such different forms of adaptive strategies, it must be asked whether or not one gender tended to adapt to widowhood better. In the interest of assessing this line of inquiry, a most useful model of research incorporating gender and adaptations to widowhood was conducted in the Netherlands. In a gendered study of well-being in widowhood, social scientist Nan Stevens incorporated specific social resources: background resources and deficits, primary relationships, and personal disposition/relational needs. Stevens found that while men and women similarly approached the major task of adaptation and experienced similar levels of life satisfaction and loneliness, widows in particular who were more independent in solving problems and who had adapted or lowered their needs for intimacy following the loss of their partner did better in widowhood.¹⁵³ The accumulation of formal studies concerning widowhood produces further area of inquiry. For instance, to what extent do family members in particular play a role in the bereavement process? An historical assessment of the family as a source of social capital for older widows and widowers must be interpreted in the larger context of caring relationships.

¹⁵² G. D. Heinemann and P.L. Evans, "Widowhood", in T. H. Brubaker (ed.), *Family Relationships in Later Life* (1990), pp. 152-156.

¹⁵³ N. Stevens, "Gender and Adaptations to Widowhood in Later Life", *Ageing and Society* **15** (March 1995), pp. 44-51.

British debates concerning the source of care in old age over the past thirty years have incorporated predominantly Conservative rhetoric about the primary role of the family as carers. At the heart of arguments from the right is an idealised middle-class perception of older people and their families:

But it all really starts in the family, because not only is the family the most important means through which we show our care for others. It's the place where each generation learns its responsibility towards the rest of society...I think the statutory services can only play their part successfully if we don't expect them to do things for us that we could be doing for ourselves.¹⁵⁴

In her early years as Prime Minister, Margaret Thatcher promulgated the view that families were no longer taking care of their older family members as they did in the past because they were discouraged to do so by 'lenient' welfare policies. However, such views relinquished the British Welfare State of an obligation to 'care' for its elderly by placing such duties at the door of the family. Therefore, critiques of right-wing policies over the period defend the partnership between the state and family, and argue that families remain as an important source of care. In this vein, Professor Janet Finch deconstructs Thatcher's main premise: 'If we take a fairly long historical perspective, we can see that people in the present are not necessarily any more or less willing to support their relatives than in the past; but the circumstances under which they have to work out these commitments themselves have changed and created new problems to be solved'.¹⁵⁵

The incorporation of Finch's arguments to analyses of Scottish family practices reveals that social norms continue to favour intergenerational caring relationships. Understandings of responsibility, reciprocity, and deservedness¹⁵⁶ have guided the Scottish ethos concerning family duty and the maintenance of kinship networks.

¹⁵⁴ M. Thatcher, "Facing the New Challenge", *Speech to WRVS National Conference*, (19 January 1981), p.3.

¹⁵⁵ J. Finch, *Family Obligations and Social Change* (1989), p. 242.

¹⁵⁶ These norms of pro-social behaviour are elaborated in K. Durkin, *Developmental Social Psychology: From Infancy to Old Age* (1995), pp. 445-446. A sociological counterpoint is addressed in M. Jellal and F.C. Wolff, "Insecure Old Age: Examination of Hypothesis That Children Will Care For Parents in Old Age", *Oxford Economic Papers* 54:4 (October 2002).

Furthermore, in line with Finch's analysis, Scots seek alternative forms of fictive kin networks and other informal sources of care in the absence of family members, and only when these resources are tapped out do older people in Scotland make use of formal services.¹⁵⁷ Common family practices in Scotland which have persisted into the modern period thus contradict alarmist projections from the political right. It can be argued that the politically-motivated sacred cow of caring relationships within the family sphere and voluntary sector has reinforced the larger problem of sexism in government policy.

A critical analysis of familial caring relationships reveals a division between genders in terms of the receipt and provision of care. It is evident that gender divisions are magnified in old age because of differential treatment in the social services. Such inequalities are present in both the formal and informal sector. This has been illustrated by various feminist studies made in England in the 1980s. In sociologist Dulcie Grove's critical study of urban women in old age¹⁵⁸, she found that social services (formal) and caring relationships (informal) were differentially distributed between men and women. Males were in receipt of a preponderance of informal care, while women tended to receive a combination of formal care. In terms of the gendered experience of *providing* informal care, Alan Walker and Hazel Qureshi found in their 1982/3 study, comprised of over 1,200 older people and their families in Sheffield, that middle-aged and young-old women predominantly took care of older family members. Indeed, women were six times more likely than men to provide older relatives with personal care.¹⁵⁹ These caring relationships involved a cyclical pattern of daughters/daughters-in-law taking time off work to provide care for older family members, thus jeopardising their own capacity to

¹⁵⁷ Interview with Irene Brown, Director of Age Concern, Dundee, Five Ways Age Concern Dundee (August 2004).

¹⁵⁸ J. Finch and D. Groves, *A Labour of Love: Women, Work and Caring* (1983)

¹⁵⁹ A. Walker and H. Qureshi, *The Caring Relationship*, p.42.

contribute towards a state/occupational pension or indeed save for old age.¹⁶⁰ The majority of the cases reflected economic and social imperatives within both the carers' and the recipients' families. Groves and others¹⁶¹ have critiqued policies which reinforce the gendered division of care. Nonetheless, such views concerning women's roles as carers still persist within families themselves in more recent times, which can be examined using specific biographical sources and interviews with older people in Scotland.

The relationship between caring responsibilities and family infrastructure in modern Scotland can be interpreted conceptually. By using two significant models taken from theoretical discourse established in the 1950s and 1960s, the impact of historical processes upon family practices becomes clear. Part of a larger project on families in the community, Willmott and Young studied older people and family structures in London in the 1950s. In their work, they described martrifocal kinship networks in terms of informal trade unions.¹⁶² The description is apt when applied to Scottish kith and kin relationships in the modern period. An investment in social and economic capital over the life course, reciprocal exchanges and caring responsibilities remained the common currency between generations.¹⁶³ Largely female in long-established working-class areas, carers were equally responsible for looking after children and older people. In the Dundee and Edinburgh study in 2004, all of the women referred to their experiences caring for their grandchildren in the recent past, and reciprocally, many of the older

¹⁶⁰ One of the few Scottish studies from the period regarding female caring responsibilities and the impact on employment is in M.L.M. Gilhooly and C. Redpath, "Private Sector Policies for Caregiving Employees: a Survey of Scottish Companies", *Ageing and Society* 17 (1997).

¹⁶¹ See A. Walker's chapter "Pensions and the Production of Poverty in Old Age", in C. Phillipson and A. Walker (eds) *Ageing and Social Policy: a Critical Perspective* (1986) and J. Neave's "Older People" in C. Glendinning and J. Millar (eds), *Women and Poverty in Britain in the 1990s*, (1992) for detailed studies of twentieth-century old-age policies in Britain which consistently rely on women taking time off work to provide care for older family members. Further analysis of the mechanics of the welfare state as regards old age pensions and services can be found in the modern welfare state section of this thesis.

¹⁶² Young and Willmott, *Family and Kinship*.

¹⁶³ In his report on the Hilltown in the 1970s, Jackson assessed that while the intergenerational household was no longer the trend, the extended family remained an essential resource. Jackson, *The City of Dundee*.

respondents were at present being informally cared for by adult grandchildren. Mrs Anderson, a great-grandmother from the Hilltown of Dundee described her role in the extended family: 'My thirteen year-old grand-daughter comes and stays every weekend. It gives her parents a break, and me a chance for some company and help with the housework'.¹⁶⁴ Mrs Anderson's family was typical insofar that the challenges of obtaining childcare and domiciliary services for older people could not always be met by working adult children, thus grandparents and grandchildren often provided reciprocal forms of informal care. Such patterns have been described conceptually in terms of 'intimacy at a distance', a phrase coined by Rosenmayr and Kockeis in their theoretical analysis of ageing and the family.¹⁶⁵ The effect of migration and smaller households, many Scottish families maintained close caring relationships with older family members from greater geographical distances. Expectations have thus changed, to the extent that biographers and most of the oral history participants had adapted to the demographic patterns of the post-war era. 'Apart from celebrations and crises, I don't expect to see family on a regular basis. Ironically, the ones I know best are the farthest flung'.¹⁶⁶ Indeed, the selection of carers has shifted over time, to the extent that older people make choices to suit their social needs as much as their caring needs. Such 'intimacy at a distance' has raised important questions as to whose responsibility it is to provide regular forms of care. The continuity of caring relationships in Scottish families has been propped by various informal and formal caring structures over the past decades, which can be understood as a mixed economy of care. Further analyses of these themes will be explored in the context of the principle of care in the community.

¹⁶⁴ *Interview with Maria Anderson*, Dundee (1 June 2004). An international perspective of this practice has been explored in M. Kohli, H. Kunemund and C. Vogel, "Intergenerational Family Transfers in Europe", *ESA Research Network on Ageing in Europe*, The ESA Conference Torun, Poland (9-12 September 2005).

¹⁶⁵ L. Rosenmayr and E. Kockeis, "Propositions for a Sociological Theory of Ageing and the Family", *International Social Science Journal* **15:3** (1963).

¹⁶⁶ J. Reid, "Squaring the Circle", in M. Simmons (ed.), *Getting a Life: Older People Talking* (2000), p. 29.

The social experience of growing older in the modern period has been shaped by tremendous societal and demographic change. These transitions have impacted older people as individuals as well as family members. At the micro level, the personal and social roles of the older individual have evolved at such a rapid pace, that the question of identity remains relatively broad, and hence quite personal. Such flexibility has been anchored by familial and public roles, which have provided the older person in the post-war era with more distinct duties and responsibilities. These latter roles may be understood as sources of continuity. Similarly, at the macro level, older populations have faced many challenges which have been brought about by economic and political changes in the United Kingdom. Work and retirement opportunities, coupled with state policies, have most profoundly influenced the daily lives of older people in terms of the population profile of Scottish communities and the provision of services, housing, and sources of care. Understandings of the modern phenomenon of ageing populations raise further questions in terms of how specific older age cohorts have historically conducted themselves within their communities. Furthermore, the central question of how individuals and families have planned for old age over the past two centuries must be addressed.

INTERPRETATIONS OLDER PEOPLE IN THE COMMUNITY: WORK, RETIREMENT AND THE WELFARE STATE

As an emerging population group in Scotland in the late modern period, older people have maintained complex socio-economic relationships within their communities. Notwithstanding the importance of the family as a source of capital, the public sphere functioned as a vital resource. Prone to contemporary economic and political trends as well as the long-term effects of modernization, the composition of these resources altered significantly throughout the period of investigation. In the early nineteenth-century, a majority of older workers remained economically active in the labour market, providing both traditional industries such as textile production and the ‘workshop of the world’¹ with much-needed human capital. Paternalistic exchanges between employer and employee thus operated as a vital source of economic interdependence throughout the life course. However, many older workers in Scotland’s staple industries quickly became redundant to new methods of production and greater demands for specialized skills, and were more vulnerable to violent boom and bust cycles in the second half of the nineteenth century.² Consequently, older people no longer able to obtain employment or simply worn out by work made greater demands upon the parish. Ill-equipped to provide for an increasing number of unemployed workers at all ages, local parochial boards and the Presbyterian Church (the Kirk) adopted stringent *ad hoc* poor relief policies. This impacted on older people most acutely, which prompted social investigations into the specific problem of poverty in old age. Leading reformers such as Dr W.P Alison, earlier in the century, and Charles Booth, later in the century, provoked much-needed debate about the rights of older people, thus contributing to contemporary

¹ Scotland’s accumulation of industrial capital and success in heavy industry, particularly ship-building and attendant industries such as steel production and coal mining, inspired the description ‘workshop of the world’.

² A thorough examination of Scotland’s industrial history is W.W.J. Knox’s *Industrial Nation* (1999).

discourse about citizenship and the social problem of poverty, which remains to be resolved in modern times.³ In the twentieth century, severe economic downturns and the impact of a postindustrial economy depreciated older and late middle-aged workers' worth as human capital, necessitating alternative formal resources. Thus the state emerged as a vital resource for all older people: the provision of pensions and statutory benefits and services were regarded as citizens' entitlements under the Welfare State.⁴ Social reformer and economist William Beveridge's formalization of pension policy, *viz* the introduction of mandatory retirement and subsequent governments' OAP legislation in the post-war period has reinforced lingering questions, such as, whose responsibility is it to plan for old age? Underscored by theoretical debates concerning the rights and duties of older citizens, formal resources including employment practices, retirement policies, and the welfare state, and informal resources such as social networks in the community and the voluntary sector operate as the basis for analysis. A critical examination of these formal and informal resources indicates that the ability to draw upon a 'mixed economy'⁵ of economic and social capital in old age was imperative throughout the late modern period.

For several centuries, European discourse concerning social and civic responsibility has tended to be aligned with antithetical models of individualism versus

³ Alison and Booth undertook practical reforms, led by the idea '...that every social problem must be broken up to be solved'. C. Booth, quoted in his Obituary, *Royal Statistical Society* (1917).

⁴ The incorporation of the self-help and citizenship debates with historical analyses of the origins of the Welfare State and old age policies are in R.M. Titmuss, *Essays on the Welfare State* (1958); P. Townsend and D. Wedderburn, *The Aged in the Welfare State* (1965); P. Thane, *Foundations of the Welfare State* (1982); D. Fraser, *The Evolution of the British Welfare State: A History of Social Policy Since the Industrial Revolution* (1984) and J. Macnicol, *The Politics of Retirement in Britain 1878-1948* (1998). It must be stressed that for the most part, this foundational body of literature seldom utilises Scotland in their case studies or interpretations.

⁵ The phrase 'the mixed economy of care' has been used since the 1960s by a number of British and American writers to characterise the mixture of private capitalism and state enterprise and activity prevalent in western European countries. These are frequently mixed welfare state systems containing public, private (commercial) and voluntary agencies, as well as mixed systems of formal care such as social services and informal care such as that provided by family or community. M. Reddin, "The Mixed Economy of Welfare" (1990).

collectivism. Although oppositional dialectic in this regard was prevalent in Scotland⁶, there is historical evidence of a tendency for Scottish society to embrace *both* extremes in practice. The influence of Scottish Enlightenment thought upon late-modern civil governance is useful in this interpretation. In 1767, the moral philosopher Adam Ferguson examined the history of civil societies, and stressed that for the benefit of societies, ‘individuals overlook their personal danger and suspend the care of their self-preservation’.⁷ Countering such communitarian ideals, Ferguson’s contemporary Adam Smith promoted self-interest, most famously in *The Wealth of Nations*. ‘It is not from the benevolence of the butcher, the brewer or the baker that we expect our dinner, but from their regard to their own interest’.⁸ The legacy of these arguments reinforced a social system which employed both ideals. Much like the early modern period, the practice of Christian Paternalism⁹ operated as an important social and economic infrastructure in nineteenth-century Scotland. A traditional system based on an ethos of benevolent *noblesse oblige*, landlords and employers were empowered to institute formal arrangements with their tenants and employees, thereby guaranteeing the rendering of faithful service. Despite numerous examples of bad lordship¹⁰ and entrepreneurs¹¹ who neglected their obligations as employers in this period, paternalistic practices persisted in industry and in the community well into the twentieth century. Primarily, this was because it reflected pervasive beliefs held in most sectors of society: although the norm of ‘self-help’ placed

⁶ Perhaps most famously in nineteenth-century Scotland were the works of Reverend Thomas Chalmers and Dr W.P. Alison.

⁷ A. Ferguson, *An Essay on the History of Civil Society* (1767). See D. Allan, *Adam Ferguson* (2006) for a revised examination of Ferguson’s life and work.

⁸ A. Smith, *The Wealth of Nations* (1776), Book I, Ch. 2. A recent analysis of Smith’s legacy is C. Smith, *Adam Smith’s Political Philosophy: The Invisible Hand and Spontaneous Order* (2006).

⁹ The use of the term Christian Paternalism is specific to the Scottish model, quite distinct from other applications, such as in relation to British colonialism or slave ownership in the United States.

¹⁰ See K. M. Brown’s analysis of Scottish nobles and their policies, in which he argues that tenants in the early modern period could reasonably expect a mixture of good lordship and Christian Paternalism to alleviate the effects of impoverishment. K. M. Brown, *Noble Society in Scotland* (2000), pp. 47–48.

¹¹ An immense body of literature addresses the problem of employers exploiting their employees in Scottish industry in the modern period, interpreted in Marxian terms as a fatal consequence of the capitalist system. Not intending to discount these sources, it is worth exploring the remaining conservative firms and industries which retained paternalistic practices, in particular concerning the practice of granting *ex gratia* pensions and occupational pensions.

responsibility upon the individual, untimely economic downturns and other factors outwith the control of the individual were expected to be ameliorated by a formal resource. Early in the period such sources included the Laird and the Kirk, to be replaced by employers and the parish in the latter decades of the nineteenth century. Indeed, the institution of state pensions and local formal services rendered in Scottish councils in the late twentieth century retain the same general formula. Unlike other Western European nations¹² which have tended to develop liberalized social democratic systems in place of Christian Paternalism, Scotland has retained fragments of both approaches in the relationship of work history and welfare policies with the experience of retirement. Consequently, debates concerning the rights of older citizens often exclude the idiosyncratic mode of applying the concepts of paternalism and citizenship in Scotland.

The foundation for political and social reform in the nineteenth and twentieth centuries, the principle of full citizenship remains more of an ideal than a reality in Great Britain. An active participant in the philosophical *milieu* which produced rhetoric along the lines of 'life, liberty, and the pursuit of happiness'¹³ and '*liberté, égalité, et fraternité*'¹⁴, nineteenth-century British society was transformed by movements¹⁵ inspired by such ideology. However, the revolutionary component present in French and American thought was not fully applied to the question of citizenship in Britain. An historical analysis of the progressive development of citizenship suggests that tenuous relationships

¹² Most notably, Scandinavian countries and the Netherlands address these economic and social structures on such terms. A recent article usefully integrates the concept of Christian Paternalism with employer/employee relations and the welfare state. U. Becker, "Welfare State Development and Employment in the Netherlands in Comparative Perspective", *Journal of European Social Policy* (2000).

¹³ T. Jefferson, *Declaration of Independence* (1776).

¹⁴ Attributed to a speech given by Robespierre in 1790, these principles have been incorporated into the French Constitution in the late modern period. French Embassy in the U.S. < <http://ambafrance-us.org/atoz/libeqfra.asp> > (20 October 2007).

¹⁵ One of the most influential examples of popular radicalism in the nineteenth century was the Chartist movement, which prompted decades of activism, culminating in parliamentary reforms such as the 1868 Second Reform Act (Scotland), when a quarter of a million working-class 'respectable urban house dwellers' were enfranchised. Universal suffrage subsequently passed in 1918 thus represented citizen's electoral rights.

between the classes and a general tendency for conservatism underlies the ambiguous application of citizenship to formal policies. For example, the premise for William Beveridge's proposals for the welfare state, *Social Insurance and Allied Services* (1942), was that a 'social service state' was to give priority to duties rather than rights. Thus Beveridge maintained a vision of economic citizenship as a social contract versus the rights of citizenship.¹⁶ Citizenship in this respect was conditional. Interpreting the institutionalization of citizenship in Great Britain and the modern drive toward social equality, sociologist T.H. Marshall outlined the elements of citizenship as an evolutionary process in his classic text *Citizenship and Social Class*.¹⁷ Civil, political, and social rights were instituted in phases, each formative period raising further questions about what rights were recognized in principle, and to what extent these rights could be enjoyed in practice.¹⁸ These 'rights' have been more recently explored in Scotland, providing specific concepts of citizenship distinct from those of Great Britain. Social historian Geoffrey Finlayson incorporated 'self-help' ideology and paternalism by defining citizenship in terms of voluntary contribution to one's own welfare and that of others.¹⁹ The dual nature of citizenship thus rests on reciprocal exchange and the voluntary principle, suggesting active participation rather than dependency. Historical analyses of civic participation, political enfranchisement and social justice provide useful methods for interpreting contractual elements of employment and the development of old age policies as rights of citizenship. Central to such analyses is the question: what are citizens' rights and what are their obligations? A review of literature concerning citizenship²⁰ and older people's status in the welfare state reveals that older citizens have not been

¹⁶ J. Harris, *William Beveridge: a Biography* (1997), p. 41.

¹⁷ T.H. Marshall, *Citizenship and Social Class, and Other Essays* (1950).

¹⁸ Marshall, *Citizenship*, pp. 10-11.

¹⁹ G. Finlayson, *Citizen, State and Social Welfare in Britain, 1830-1990* (1994), p. 68.

²⁰ See for example R. Plant, "Citizenship and Social Security", *Fiscal Studies* **24:2** (2003).

guaranteed a prescribed set of rights or equal access to formal resources in the modern British Welfare State.

The problem of inequality has been exacerbated over time among older population cohorts in the United Kingdom. Although older populations in the post-war period have achieved a standard of living better than previous cohorts, many older people have experienced various forms of social and economic poverty, resulting from unequal access to formal resources throughout the twentieth century. Professor R.M. Titmuss observed in the 1950s that the introduction of welfare state policies had not ameliorated these inequalities: 'Already it is possible to see two nations in old age; greater inequalities in living standards after work than in work; two contrasting social services for distinct groups based on different principles'.²¹ Such divergence can be explained in terms of capital and state-society power relations. In the first instance, social and economic capital operates as a conceptual framework upon which various theoretical approaches have been developed over the past thirty years. Further to Pierre Bourdieu's useage of social capital as an individual attribute, theorists have applied the concept as a property of collectives. Using the community as a model, sociologist Robert Putnam argues that social connections such as work, church, neighbourhood, and an assortment of other ties constitute collective social capital.²² His emphasis on the community as a resource lies in his conservative understandings of the social contract: 'Networks involve mutual obligations [which] foster sturdy norms of reciprocity'.²³ Thus social capital refers to the norms, relationships, and institutions that operate as the infrastructure in society. Because inequality is inevitable in the social dimension of the community, analyses of power relations must be incorporated in a communitarian model of social and

²¹ R.M. Titmuss, *Essays on the Welfare State* (1958), p.74.

²² R. D. Putnam, *Bowling Alone: the Collapse and Revival of American Community* (2000), p. 274.

²³ Putnam, *Bowling Alone*, p. 20.

economic capital. Putnam and others²⁴ have addressed this with the theoretical concepts of bridging and bonding.²⁵ A fairly recent interpretation of collective forms of social capital, 'linking capital'²⁶ is also a useful tool to investigate older people's relationships with current or former employers, as well as other formal contacts in the community. Social science literature concerning capital and power relations provides scope for historical enquiry into two separate themes. Firstly, what explains the persistence of social and economic inequality and power imbalances within and between older age cohorts in the post-war period; and, secondly, how has regionalism in Great Britain intensified these problems? An examination of resources at the micro and macro level reveals the long-term consequences of *ad hoc* retirement policies and social services.

A phenomenon of the late modern period, an ageing society was impacted by the rise of the British Welfare State. The formalization of older people's roles and entitlements as retired citizens reflected a continuity of historical processes and deeply-held beliefs in autonomy. This process was fundamentally linked to late nineteenth-century ideology concerning the deserving [elderly] poor. Writing in 1884, the Charity Organisation Society (COS) secretary Charles Loch argued that: 'We must use charity to create the power of self-help'.²⁷ Principles such as these were the impetus for a social contract between older citizens, their communities, and the welfare state. From 1948, the state and voluntary sector were to play equal parts in the modern execution of old age

²⁴ S. Szrezer and M. Woolcock, "Rejoinder: Crafting Rigorous and Relevant Social Theory for Public Health Policy", *International Journal of Epidemiology* **33:4** (2004).

²⁵ Bonding social capital refers to trusting and cooperative relations between members of a network who share a similar identity, e.g., old age, and bridging social capital has been defined as the connections between those who are unlike another in identity, yet share the same economic status and power. Putnam, *Bowling Alone* (2000), Pp. 22-23.

²⁶ Szrezer and Woolcock define linking capital as vertical power relations based on norms of respect and networks of trusting relationships between people who are interacting across explicit, formal, or institutionalized power or authority gradients in society. Szrezer and Woolcock, "Rejoinder" (2004), p. 702.

²⁷ Quoted in C.L. Mowat, *The Charity Organisation Society, 1869-1913: Its Ideas and Work* (1961), p. 35. A Scotsman, Charles Loch was most influential in the COS and made a great contribution to welfare policy and legislation.

benefits and services.²⁸ Modern sources critique the cumbersome nature of this relationship. From a theoretical standpoint, this has been addressed in functionalist, Marxist, and postmodern discourse throughout the post-war period. The synthesis of thought in the social sciences concerning the modern experience of growing older has emerged in more recent years as the concept of rational agency. In a fresh look at old age and formal care, social scientist George Agrich deconstructs modern idealistic thought in social policy theory. 'Older people are rational agents who determine the kind of lives they wish to conduct. Their judgments...reflect a general social view predominant at certain historical periods regarding what supports or thwarts autonomy'.²⁹ Agrich's analysis provides resolution for the individual/collective debate concerning responsibility for old age, and can be applied in two ways. Firstly, the modern invention of retirement³⁰ can be understood as the accumulation of an individual's resources and endeavours over the life course, thereby impacting on the older person's ability to function as a consumer³¹; and, secondly, the consolidation of charitable bodies and OAP advocacy within the voluntary sector can be interpreted as an essential socio-economic resource which provides older clients³² greater access to social welfare on their own terms and opportunities to retain autonomy. The modern experience of retirement and the vital role of formal services in the voluntary sector indicate that planning for old age has continued to be both an individual and collective process.

²⁸ Resulting from the local authority (LA) proviso in the 1948 National Assistance Act, voluntary organisations could obtain funding from the LA. Many voluntary agencies at local and national level flourished, and raised awareness of the social problems of vulnerable groups in society such as the elderly. Age Concern (2004).

²⁹ G. Agrich, *Dependence and Autonomy in Old Age: An Ethical Framework For Long-Term Care* (2003), p. 70.

³⁰ Leslie Hannah explores the relationship of occupational pensions, the welfare state and retirement in these terms. L. Hannah, *Inventing Retirement: The Development of Occupational Pensions in Britain* (1986).

³¹ Andrew Blaikie incorporates functionalist and postmodern methodologies in his analysis of older people as self-reliant consumers in a service economy. A. Blaikie, *Ageing and Popular Culture* (1999), p.59.

³² The descriptor 'client' emerged from oral history case studies conducted within the voluntary sector in Dundee and Edinburgh. The directors of various Scottish charitable organizations described older people in this way because it stressed their individual agency within the context of a collective structure.

The historical examination of the socio-economic experience of old age in modern Scotland reveals several distinctive patterns. Firstly, social norms and contemporary ideas about older people's public roles and duties are factored into the gradual collective process of adapting to an ageing society. Conservative principles tended to predominate in a fairly paternalistic system. Secondly, the social experience of growing older has until more recently been bound by social status. For example, in the nineteenth century an emerging middle class had particular aspirations for 'retirement', of which many have shaped more recent understandings of the experience of retirement. Conversely, working-class people, older men in particular, have experienced the greatest degree of change in one hundred and fifty years. Within a pre-welfare state system, older men and a significant number of women participated in the labour market, with few expectations for a 'good old age'. The introduction of pensions and a fixed retirement age extended the right to retire to all classes. And lastly, the formalisation of old-age benefits and services in the twentieth century indicates an emerging Scottish political agenda. Although operating under a British Welfare State system, the formal and voluntary sector has distinctively retained a separate set of powers within Scotland. Therefore, analyses of work and retirement policies in the modern period reflect a specifically Scottish application of individual and collectivist practices.

CHAPTER THREE

EMPLOYMENT AND THE MODERN EXPERIENCE OF RETIREMENT *c.1845-1999*

**‘THEY FAIRLY MAKE YE WORK’:
EMPLOYMENT IN OLD AGE, c. 1845-1960
(3.1)**

The history of Scotland’s industrial past provides a basis for the analysis of older people’s roles as workers and transitions from employment. Between 1830 and 1914, Scotland experienced sweeping change resulting from the contradictory effects of industrialisation and urbanisation. Rapid transformation in the iron, steel, mining, shipbuilding, and textile industries made vast fortunes for the Scottish élite, but at the other end of the social scale the working class was exposed to the alarming instability of boom and bust cycles.¹ Economic uncertainty intensified differentiation between the classes. As an extension of social class, work roles in the life career determined the qualitative experiences of growing older. Employment in old age was therefore a source of class identity as well as an economic necessity. In spite of differences in the terms of the nature of employment between the classes, the compulsion to remain in at least part-time employment was a shared expectation for all social classes. Formal sources and biographical material from the period indicate that older men and a significant proportion of working-class women remained in some form of employment. Analysis of this material raises specific questions concerning older workers’ status. Subjective interactions between older employees and their employers were determined by prescribed norms and practices in the workplace. These exchanges have been interpreted in functionalist and postmodernist ways. However, the impact of historical processes upon work patterns over time must be incorporated in an examination of the experience of work in old age. Subject to economic trends and employers’ policies, older people in Scotland participated in the labour force throughout the nineteenth and early twentieth centuries.

¹ See W.W. Knox, *Industrial Nation* (1999) for a thorough interpretation of these economic processes in nineteenth-century Scotland.

An outstanding feature of Scottish industry in the nineteenth century was the prolonged transition from paternalism to collective bargaining as a basis for labour relations. The institutional characteristics of paternalism determined the conditions of employment in many of Scotland's industries. Conversely, the absence of paternalistic practices and ineffectual trade union organisation in industries such as jute manufacture illustrate the consequence of the demise of paternalism.² Therefore, older workers' experiences of employment varied considerably on the basis of these differentials. Conceptually, paternalism can be applied to two aspects of the life cycle of the employee. Firstly, locally-owned and managed firms established highly personal relationships in which many older workers were protected from more demanding performance expectations. In exchange for productivity, job descriptions were adapted and hours of work modified for many employees in old age.³ For instance, miners in the west of Scotland were known to make accommodations for older workers by assigning less demanding responsibilities and shorter work shifts.⁴ Secondly, employers dominated relations within firms through the conditional provision of benefits in addition to the wage, such as employment for widows, accommodation, and company pensions. These practices have been explored as a form of benevolence: paternalism presumed that people were unable to save enough for their own old age, and thus for their own interest

² The cessation of paternalism can be explained in terms of the collapse of traditional industries coupled with the emergence of large business corporations and international ownership. Smaller local businesses in Scotland have exhibited some vestiges of the paternalistic system in the latter decades of the twentieth century. A.P. Thornton, *The Habit of Authority: Paternalism in British History* (1966). In his doctoral thesis about working-class life in Dundee, D. Lennox observed as a contemporary that in jute, the history of Trade Unionism was one of comparative failure. D. Lennox, *Working Class Life in Dundee for Twenty-Five Years, 1878-1903* (1906), p. 177.

³ A review of documents from Scottish breweries indicates that older men and women undertook different jobs in old age, which most notably were less physically demanding. The directors themselves commonly reduced their own hours in old age. Salaries Book Thomas and James Bernard Brewers (1889-1914) [TJB 8/3/1/1]; Wages Books William McEwan & Co Ltd. (1896-1900/1901-1913) [SNM8/3/2/13-14]; Private Correspondence William Younger (1884-1900) [WY 5/9/1]; Private Minutes William McEwan & Co Ltd (1918-1959) [SNM1/6/2/1] Held at Scottish Brewery Archive, University of Glasgow. These practices will be further addressed in the case studies.

⁴ R. Mitchison, *Life in Scotland*, (1978), p. 125

required the protection of a benevolent employer.⁵ Such arrangements were an investment for all concerned. As human capital, workers were compelled to fulfil their obligations to the firm.

The principle of human capital as a component of employer/employee relationships has been specifically applied to a theoretical model of older workers in the economic life cycle. Judge Richard Posner divides his analysis of human capital investment by class and age. In terms of professionals, increases in wage levels are seen to be driven by gains in productivity, so that employees often do not reach their earnings peak until the last year of employment. Such peaks may occur past the age of statutory retirement. Contrastingly, for the working class the cost of continued working may be high because the effects of ageing may require the worker to exert increasing effort in order to be able to meet the requirements of the job, and the anticipated income from continued working may be low as well as because of diminished incentive to continue investing in the older worker as human capital.⁶ Depreciation of human capital as a feature of the ageing process thus necessitated formal arrangements between employer and employee in anticipation of retirement. Because few older men experienced a long retirement in nineteenth-century Scotland, surviving spouses and children were the beneficiaries of these exchanges. Functionalist understandings of older people's obligations as employees have more recently been expanded upon in social theory to address the specific roles of the older worker.

Current debate about older workers' status makes connections between discursive construction of identity, historical processes, and the outcome of policies in the nineteenth and twentieth centuries. Building upon gerontological studies conducted in Britain over the past decade, two Australian academics have explored the identity of

⁵ D. M. Weiss, "Paternalistic Pension Policy: Psychological Evidence and Economic Theory", *University of Chicago Law Review* **58:4** (1991), p. 1276.

⁶ R. Posner, *Aging and Old Age* (1995), p.55.

the older worker. In the first of these, an examination of reform in public organisations raised salient points which can be applied to the nineteenth-century experience of employment in Scotland. The vital role of the experienced worker was emphasised as a source of social capital in the workplace. The older workers' function as a transmitter of knowledge was thus contingent upon specific levels of competence achieved through mastering their job. At the level of the skilled worker, competence assured participation in 'the complex web of relationships between people and activities within specific socio-cultural settings' [such as the workplace].⁷ A reflection of various developments in employment policies in the twentieth century, the second study concerning identity in old age addressed the problem of exclusion. Several points emerge from this analysis: firstly, older worker identity was constructed in relation to a number of other excluded groups and social actors in the labour market, such as women; secondly, unemployed older people were presented as a specific disadvantaged group in receipt of resources from the government; and, thirdly, older workers were constructed as easier to replace, and therefore lesser in priority in terms of assistance and attention.⁸ In the context of the problem of establishing older worker identity in such terms, these points contribute to broader issues about an uncertain labour market in the twentieth century. Flexible interpretations of identity provide scope for investigating the various roles and duties older people undertook as employees in Scotland in the industrial age.

An historical examination of work in old age is limited by the range of available Scottish sources. Quantitative studies are impaired by record-keeping practices in the nineteenth century. In his doctoral thesis about the linen industry, David Steele noted that a majority of business concerns belonged to 'unpretentious men who kept the minimum of records'. In most industries, secrecy was a watchword, and firms were

⁷ B. Jorgensen, "Individual and Organisational Learning: a Model for Reform for Public Organisations", *Foresight* **6:2** (2004), p. 3.

⁸ S. Ainsworth, "The Discursive Construction of Older Worker Identity: a Reflection on Process and Methods" *Tamara: Journal of Critical Postmodern Organization Science* **1:4** (2001), pp. 9-10.

unwilling to write more than they had to about themselves. Many businesses were grossly inefficient, and often incompetent in their book keeping.⁹ A meticulous search through records in the Dundee jute industry bears this point out. Older workers were mentioned only peripherally in injury reports and occasional minutes, and seldom included in wage books. Similarly, women were often excluded from the occupational data reported in the decennial census, which limits the scope of analysis which could be derived from the use of the census as a source.¹⁰ Hence Scottish regional census enumerators' reports have proven to be essential in terms of obtaining information about occupational status in old age prior to 1901. Qualitative material is comparatively more abundant. Auto-biographies provide a clearer picture as to older workers' status. However, existing working-class narratives are under-representative of the population group. This gap is made even more apparent when set against vast collections of nineteenth-century biographical narratives concerning the great and good, a feature of the Scottish literature. A specific limitation in the use of these sources is the lack of female accounts of work in old age.¹¹ Nevertheless, biographical material provides instructive examples of attitudes towards employment, levels of participation, and the nature of work conducted in old age.

Reminiscences written in the late nineteenth and early twentieth centuries indicate that work in old age was universally perceived as a source of continuity in the life course. In spite of poor health and difficulty walking in the last thirteen years of his life,

⁹ D.J.A. Steel, *The Linen Industry of Fife in the Later Eighteenth and Nineteenth Centuries* (1975), p. 260.

¹⁰ Information about a household, including their occupations, varied in the conscientiousness with which census enumerators elicited information from each person in the household. More problematically, the clerks who compiled and reviewed the census data made a variety of marks on the returns. Many of these tally marks were written over personal information and some fields, such as ages, are difficult to read. As a result, older workers in general would have been underrepresented in the census. Eleanor Gordon addressed this point: 'The problem of underrepresentation was particularly acute for female agricultural labour and married women's work, both of which were intermittent and therefore likely to be excluded from the calculations'. E. Gordon, "Women's Spheres", in W.H. Fraser and R.J. Morris (eds), *People and Society in Scotland, II* (2000), p. 208.

¹¹ This problem has been discussed in S. Ainsworth, "The 'Feminine' Advantage': a Discursive Analysis of the Invisibility of Older Women Workers", *Gender, Work and Organization* 9:5 (2002).

James Chalmers spent long hours running the family book selling business in Dundee. His determination to remain fully occupied until the day of his death at the age of 71 was evident in his wife's recollections of him.¹² Unlike Mr Chalmers, many workers applied for promotions or changed jobs to continue their employment in old age, and then retired in late old age. A few examples of this are in John Burnett's collection of British working-class autobiographies. In one entry, Emmanuel Lovekin, a mining 'butty', explained that he elected to leave his job as a coal miner in middle years with the view of restoring his health¹³, only to return to work as a manager of a colliery in later years. He noted that he worked in this capacity until the age of 72, and retired in 1891 because he had become 'feeble'.¹⁴ W. Norrie's volume of Dundonian biographies is most useful in ascertaining the general practice of middle-class men working well past their middle years, often until their death. Ministers and doctors typically remained in employment their entire adult lives, albeit with foreshortened hours in old age.¹⁵ Dr W.P. Alison of Edinburgh resigned his University Chair after protracted illness, and died shortly thereafter.¹⁶ Scottish biographies thus provide various insights into older men's personal experiences of work in later years. Without the benefit of an equivalent collection of biographical material, data analysis (see Tables 3.1- 3.6) and secondary literature provides further insights into older women's work experiences.

¹² W.J. Smith (ed.) *James Chalmers: Inventor of the Adhesive Postage Stamp* (1970), pp. 27-29.

¹³ This was not a small consideration. Reference to the demanding nature of mining was in the 1851 Census: 'Miners die in undue proportions, particularly at the advanced ages, when their strength begins to decline'. BPP, *Census 1851* (1854), pp. 62-63.

¹⁴ J. Burnett (ed.), *Useful Toil: Autobiographies of Working People from the 1820s to the 1920s* (1974), p. 296.

¹⁵ W. Norrie (ed.), *Dundee Celebrities of the Nineteenth Century: Being a Series of Biographies of Distinguished or Noted Persons* (1873).

¹⁶ S. Martin, 'W.P. Alison: Active Philanthropist and Pioneer of Social Medicine', (Unpublished PhD, University of St Andrews, 1995), p. 49.

Table 3.1 The Main Occupations of Older Employees in Edinburgh, by Gender (1851)

Occupations	<i>Male</i>			<i>Female</i>		
	55+	65+	75+	55+	65+	75+
Domestic Servant	56	29	10	360	154	63
Tailor	129	85	21	2	2	0
Shoemaker; Shoemaker's Wife	260	124	28	124	25	6
Carman, Carrier, Carter	78	34	12	na	na	na
Messenger, Porter	125	81	19	na	na	na
Agricultural Labourer	341	198	75	116	61	18
Gardener	144	87	25	14	3	2
Carpenter, Joiner	204	107	30	na	na	na
Mason, Pavior	198	68	19	na	na	na
Blacksmith	90	46	15	na	na	na
Labourer	261	141	46	12	2	0
Lodginghouse Keeper	18	10	5	339	170	43
Miliner	na	na	na	94	33	7
Seamstress	na	na	na	177	84	16
Washerwoman	na	na	na	397	154	35
Totals	1904	1010	305	1635	688	190
Percentage of Older Working Population , by Age Group	35%	38%	37%	54%	52%	50%

[Source: 1851 Census]

Table 3.2 The Main Occupations of Older Employees in Forfar, by Gender (1851)

Occupations	<i>Male</i>			<i>Female</i>		
	55+	65+	75+	55+	65+	75+
Tailor	51	37	17	0	0	0
Shoemaker; Shoemaker's Wife	141	71	23	69	22	2
Farmer; Farmer's Wife	420	281	145	258	106	20
Agricultural Labourer	416	223	98	74	52	17
Farm Servant	38	11	4	11	9	3
Carpenter, Joiner	107	38	38	na	na	na
Mason, Pavior	112	45	20	na	na	na
Flax, Linen Manufacture	1200	622	198	1015	602	209
Labourer	206	108	39	3	1	0
Ship Owner	119	50	15	1	2	1
Domestic Servant	6	4	4	126	83	65
Miliner	na	na	na	69	19	6
Farmer's "Other" Relations	na	na	na	74	52	17
Washerwoman	na	na	na	126	45	11
Lodginghouse Keeper	2	2	0	59	38	6
Totals	2818	1492	601	1885	1031	357
Percentage of Older Working Population, by Age Group	65%	67%	68%	78%	75%	70%

[Source: 1851 Census]

Table 3.3 The Main Occupations of Older Employees in Edinburgh, by Gender (1901)

Occupations	<i>Male</i>			<i>Female</i>		
	45+	55+	65+	45+	55+	65+
Commercial or Business Clerk	373	193	69	26	9	0
Carmen, Carrier, Carter	316	146	47	0	0	0
Shoe/Boot Maker	212	194	108	4	3	0
Carpenter, Joiner	543	393	122	0	0	0
Mason	368	222	48	na	na	na
Painter	351	176	57	1	1	0
Printer	323	188	68	11	2	2
Tailor	284	183	98	48	20	7
Coachmen, Groom	277	143	45	na	na	na
General Labourers/Charwoman	407	227	66	444	360	176
Domestic Service	51	34	14	954	549	231
Lodginghouse Keeper	23	14	6	209	179	129
Dressmaker	0	0	0	309	175	62
Nurse, Invalid Service	6	6	4	168	134	49
Laundry Services/Washerwoman	15	5	4	287	181	78
Totals	3549	2124	756	2461	1613	734
Percentage of Working Population by Age Group	28%	29%	26%	64%	65%	63%
[Source: 1901 Census]						

Table 3.4 *The Main Occupations of Older Employees in Dundee, by Gender (1901)*

Occupations	<i>Male</i>			<i>Female</i>		
	45+	55+	65+	45+	55+	65+
Carmen, Carrier, Carter	249	139	33	na	na	na
Messenger, Porter	99	112	80	0	1	0
Ironfounder	159	97	35	na	na	na
Blacksmith	130	111	31	na	na	na
Erector, Fitter, Turner	209	115	26	na	na	na
Carpenter, Joiner	177	163	60	0	0	0
Mason	145	91	40	na	na	na
Hemp, Jute, Cocoa Fibre Manufacture	810	464	246	2257	1129	313
Shoe/Boot Maker	113	102	49	4	2	0
General Labourer	230	147	73	0	0	0
Domestic Servant	2	0	0	141	82	42
Charwoman	na	na	na	65	51	31
Laundry Services/Washerwoman	2	4	0	94	78	51
Nurse, Invalid Service	0	0	0	35	44	23
Dressmaker	na	na	na	125	74	35
Totals	2325	1545	673	2721	1461	495
Percentage of Working Population by Age Group	39%	41%	43%	80%	76%	70%

[Source: 1901 Census]

The most important change in occupational data between the periods was the rise of the jute industry in the 1850s. The effect of this phenomenon is quite clear among both the male and female figures. In spite of quantitative problems arising from inaccuracies in the census, the role of particular industries as supports to the jute trade are also worth noting. A review of the material provides an insight into the class of work conducted by older people.

Table 3.5 *The Working Class as a Percentage of all Older Employees in Edinburgh and Forfar, by Gender (1851)*

	Males		Females	
	55+	65+	55+	65+
Edinburgh	%	%	%	%
Percentage of Older Workers	79	77	88	84
Percentage of Entire Older Population	75	68	32	24
Forfar	%	%	%	%
Percentage of Older Workers	92	90	96	92
Percentage of Entire Older Population	91	86	42	36

Source: Percentages based on numerical data taken from the *1851 Census*

Table 3.6 *The Working Class as a Percentage of all Older Employees in Edinburgh and Dundee, by Gender (1901)*

	Males		Females	
	55+	65+	55+	65+
Edinburgh	%	%	%	%
Percentage of Older Workers	82	79	88	88
Percentage of Entire Older Population	74	47	19	11
Dundee	%	%	%	%
Percentage of Older Workers	92	92	96	95
Percentage of Entire Older Population	87	60	30	16

Source: Percentages based on numerical data taken from the *1901 Census*

Comparisons between Edinburgh and Dundee on the basis of class reveal small changes over time. Work was disproportionately concentrated in working-class occupations between 1851 and 1901. More noticeable change can be seen in terms of older populations as a whole. This trend was marked among women: in fifty years' time, proportionately less than half of older women in the age group 65 and above were employed.

In the modern period, employment in old age was an economic necessity for many older women in Scotland. A high proportion of working-class women and a substantial number of lower middle-class women often supported themselves as widows or contributed to a larger family budget of which they were not the sole support.¹⁷ Indeed, few older women could afford to live singly supported only by a pension or their own wages. In 1890, the national average wage for a woman was 42 percent of the male average, and only comparatively higher at 53 percent of their male counterparts in the textile industry.¹⁸ Lower pay for women was thus a problem for older female workers. The historian Eleanor Gordon explains: ‘Lower pay received by most women was justified by the assumption that women were economic dependants rather than providers’.¹⁹ Just as wages were a distinctive differential between men and women, women’s work histories were more variable. A controlled sample of entries from the 1851 and 1901 Census Enumerators’ reports²⁰ quantifies the range of occupations older women held. For example, agricultural work and employment in textile industries provided women with occupations at all stages of their work lives; indeed, many married women worked principally in these occupations. Professions such as teaching had a marriage bar²¹, in that positions were reserved for unmarried women and widows. Other categories of work such as the management of lodging houses and domestic service provided older spinsters and widows in particular with a form of remuneration. The sexual division of labour as well as the effects of ageing limited women in their choices of

¹⁷ J. Burnett, *A History of the Cost of Living* (1969), p. 249. Burnett estimated that in 1851 British semi-skilled male workers earned between £40 and £52 per annum, earnings just about sufficient for subsistence for the average household with three children.

¹⁸ BPP *Return of the Rates of Wages in the Minor Textile Trades of the United Kingdom* (1890).

¹⁹ E. Gordon, “Women’s Spheres”, in Fraser and Morris, *People and Society in Scotland* (2000), p. 214.

²⁰ M. Anderson, *1851 Census: National Sample of the Enumerator’s Returns* (1984); General Registry Office. (GRO) *Census of Scotland: 1901 Enumeration, Dundee* (2001); GRO. *Census of Scotland: 1901 Enumeration, Edinburgh* (2001).

²¹ Until the post-war period, married women were barred from the teaching profession in Scotland. This was purely normative in practice. H. Corr, “An Exploration Into Scottish Education”, in Fraser and Morris, *People and Society in Scotland* (2000).

occupation. Older women were excluded from certain trades because the work required a high level of knowledge and experience, and was rigorous for even the most young and fit females.²² Consequently, elderly women were more likely to be in menial industrial tasks, such as cleaning and jute preparation. A reinterpretation of women's lives in old age reveals that older women played an important role in their households as providers of incomes and services. Wider perspectives of employment in Scotland can be obtained from original research in the areas of the brewing and jute industries.

Case studies of two separate industries in operation in the nineteenth and twentieth centuries further historical discourse of older workers in Scotland. These were selected on the basis that they are equally representative of the late modern Scottish economy. The first of these is the brewing industry, which was chosen because it was an exemplar of national economic and historical trends.²³ In the eighteenth century, the domestic Scottish brewing market had grown as a commercial enterprise as a result of population growth, urbanisation, and the rise of the wage economy. By 1750, there was a wave of public breweries, owned by local families. In the nineteenth century, many of these breweries were based in Edinburgh. In addition to linkages the industry had with agriculture, glass manufacture, sugar boiling and coal mining, there were two distinct categories of labour requirements in the brewing industry.²⁴ A small number of highly skilled men were on the permanent staff, and a body of general labourers who were involved in the day-to-day activities of malting, malt grinding, millwrighting, and coopering. Brewing being a seasonal activity, labourers might be laid off from the late spring to early autumn, and most workers in rural breweries would take on jobs as farm

²² A description of the work conditions experienced by women in the spinning and weaving industries are in W.W. Knox, *Hanging by a Thread : the Scottish Cotton Industry, c1850-1914* (1995); also W.M. Walker, *Juteopolis: Dundee and its Textile Workers 1885-1923* (1979).

²³ I. Donnachie, *A History of the Brewing Industry in Scotland* (1979), pp. 234-5. Donnachie argues that 'it would be difficult to find a better barometer of economic conditions' because statistics of output in the brewing industry broadly mirrored the index of industrial production in Scotland over the entire period.

²⁴ C. McMaster, "A History of Brewing in Scotland" (1985), pp 1-4.

servants or labourers for the summer.²⁵ The concentration of male employees during the nineteenth century was fairly typical of the experience of employment in other Scottish industries at this time. Modernisation and innovation continued throughout the period, allowing the industry to keep pace and compete. In the twentieth century, women entered the industry as a result of further innovations: bottling was a major development of the period²⁶, which facilitated development and extension of the breweries, and obviously a new source of employment. Records obtained from the larger breweries provide further insights into employers' practices of paternalism and older workers' specific experiences in the brewing industry in the nineteenth and twentieth centuries.

A reflection of their value to the brewing industry, employees occupied a specific status in old age. Workers were individually assessed on the basis of their accumulated skills and faithful service to the firm, and provided for accordingly. The level of regard directors had for many of their older employees was quite clear. More specifically, their knowledge was valued at a premium:

3rd November 1925

A letter from Mr George Mackay, the company's Agent in Dundee was read: Mr Mackay stated that owing to advanced years he desired to retire from the Company's Service in which he had been for nearly fifty years...The Directors accepted his resignation, and during the pleasure of the directors [he would] receive a monthly allowance of £62, 10/- on the understanding that he would be available for consultation and that he would in no way promote the business of the company's competitors.²⁷

Continued service with consideration to age also entailed the lightening of duties. (See Illustration D.) Additionally, provision for old age and retirement was extended to the family members of former employees upon death. As an increasing number of women were employed in the industry in the twentieth century, tied accommodation and

²⁵ Donnachie, *History of the Brewing Industry*, pp. 85, 94.

²⁶ In 1903, cutting-edge innovations such as carbonation, filtration and quick chill revolutionised beer bottling. Anon. *A Short History of George Younger & Sons Ltd.* (1925), p. 23.

²⁷ William McEwan & Co, Minutes, *Private Minutes 1918-1959* (3 November 1925) (UGBA SNM 1/6/2/1).

positions in the firm were commonly given to widows in addition to pensions. On the death of Mr Allen, the accountant for McEwans, a grant of £100 was made to Mr Allen's widow, and she was offered a post in the office.²⁸ Appreciation for loyalty to the firm was also expressed in the form of annual bonuses and intermittent financial support. For instance, in a letter drafted to William Younger, the story of a late middle-aged worker was revealed: 'I am temporarily embarrassed financially...I have had to help my mother to the tune of £298 for a rascally tenant of her house who left arrears of rent and large gas, electric, and telephone bills'.²⁹ Accompanying the letter was the franked receipt of the sum of £500, an interest-free loan for the individual making the request. Paternalism was at the heart of such arrangements, but investigations of other industries in the period suggest that these practices were not exceptional.³⁰ Thus the jute industry in Dundee provides a striking counterpoint to these practices in its own role as a large employer of older people.

²⁸ William McEwan & Co, Minutes, *Private Minutes 1918-1959* (28 December 1927) (UGBA SNM 1/6/2/1).

²⁹ William McEwan & Co, Letter drafted to William Younger, *Private Minutes 1918-1959* (2 July 1952) (UGBA SNM 1/6/2/1). Similar requests were addressed in such manner in an earlier period. An indication of how important it was to Brewery directors to honour older workers' requests, these were resolved with immediacy. Even while away from the office on holiday or on business, William Younger, of Younger's Brewery replied to letters requesting loans, favours, and pensions. William Younger & Co, Ltd., *Private Correspondence* (1897) (UGBA WY 5/9/1).

³⁰ The Edinburgh-based publishing house Blackwood was well-known for its paternalistic practices and equitable treatment of its older employees and affiliated authors. Company records and papers extending from 1845 to 1957 strongly convey a 'family' firm. See F.D. Tredrey, *House of Blackwood* (1954) and D. Finkelstein, *The House of Blackwood: Author Publisher Relations in the Victorian Era* (2002).

Illustration D: Younger's Staff



[Source: Untitled Group Photograph, William Younger & Co (1914) (University of Glasgow Brewery Archive)]

The assembled staff provides an interesting composite of management, clerical staff, chemists, engineers, and labourers in the brewing industry. Based on the arrangement of staff in terms of their status in the firm, it is evident that older men were fairly evenly distributed. Accommodation for the physical demands of labour is indicated by the fact that most of the workers who provided muscle for the job (standing in the back rows and seated in the front) tended to be younger.

As the dominant employer in Dundee for the period extending from the middle of the nineteenth century until 1945, the jute industry's economic role was significant. A brief examination of the rise of the industry provides an understanding into the circumstances surrounding its ascendancy. The history of jute was described in careful detail in Peter Carmichael's autobiography.³¹ From the 1820s, flax and linen manufacture utilised recent innovations in the use of steam power and production in factories. Emerging as an important employer in Dundee, flax mill owners invested in more efficient methods of production over the period. In 1850, the largest of the flax mills and linen factories were made even larger at the same time that jute was beginning to be largely manufactured in Dundee.³² This set the stage for the future of jute for two reasons. Firstly, because the flax trade was bad in the period 1847-1851, it was substituted by jute for its cheapness. An international demand for coarse linens which arose from the wars in the period rapidly extended the manufacture of jute fabrics in Dundee.³³ Secondly, a vital outcome of the introduction of power-driven machinery at the time was that female labour replaced that of males. Contemporary sources stressed the importance of women in the industry. 'The steadiest operatives...are the married women, and therefore they are frankly preferred by owners and managers'.³⁴ The feminisation of the jute industry determined employment patterns and the domestic sphere in Dundee for over one hundred years.

The interconnection between family life and work in the Dundee jute industry provides the basis for a unique case study of older women's economic roles and obligations. Interpretations of women's experiences in the labour force indicate that

³¹ Born into a family of flax spinners, Peter Carmichael spent his entire life engaged in the textile industry in Dundee, and spent many years as a partner of the Baxter's firm and as the foremost authority on jute production. Carmichael's position in the jute industry was founded on sound knowledge of machines and the principles involved in their construction. P. Carmichael, *Reminiscences of the Life and Work of Peter Carmichael*, Vol. I (1890), p.5.

³² Carmichael, *Reminiscences of the Life*, Vol. II (1890), p. 99.

³³ Carmichael, *Reminiscences of the Life*, Vol. II, pp. 183-4; I.F. Gibson, "The Revision of the Jute Wages-Structure", *Scottish Journal of Political Economy* 4:1 (1957), p. 47.

³⁴ Lennox, *Working Class Life in Dundee* (1906), p. 171.

wider social relations contributed to work histories over the life course. Eleanor Gordon refers to the feminist project in which divergent experiences of female waged labour are analysed in these terms.³⁵ As the principal earners for their families, women negotiated with other women in their kinship networks to fulfill their professional and domestic responsibilities. Reciprocation between generations was facilitated by ‘speaking for’³⁶ younger female employees, looking after family members while their mothers worked, and undertaking employment in old age. The experience for most women was a progressive movement dovetailing between the home and work as a response to specific family concerns and economic imperatives. Billy Kay interviewed an older woman in 1980 who explained: ‘When I got married an’ athing, ye ken, ye were off tae hae bairns, an’ then ye were back again, and then ye bid off tae hae anither bairn...Meh God, ye worked tae ye were near fadin’ awa. My grannie was near seventy an’ she was still in jute, an auld woman!’³⁷ Work in old age was thus a source of continuity.

An assessment of older women’s productiveness indicates a divergence of status in the jute factories. Firstly, many older women had to adapt to the demanding nature of employment in jute. In the nineteenth century, women in their sixties and seventies either worked part-time as spinners or weavers, or on a full-time basis as cleaners and jute preparers.³⁸ As many of these latter duties were incorporated into the daily routines of employees at all ages, work became harder for older women in the twentieth century. The long-term challenges of retaining employment in jute manufacture were reported in a Nuffield survey of the problems of ageing:

³⁵ E. Gordon, “Women, Work and Collective Action: Dundee Jute Workers 1870-1906”, *Journal of Social History* **21:1** (1987), p. 27.

³⁶ In an oral history account of the jute industry, Thomas Ross explained that entry into most occupations was contingent upon family connections in the firm. T. Ross, *Interview* (1966).

³⁷ B. Kay, *Odyssey* (1980), p. 39.

³⁸ A controlled sample of enumerator’s reports produced a short list of occupations older women had in the jute industry above the age of 60. GRO, *Census of Scotland. 1901 Enumeration, Dundee* (1901).

‘Many elderly [jute] workers are not fit for a day’s work. If they are employed on the same operation as other adults, exception is often taken that they do not do their full share, yet have the same wage plus a pension. There are instances where the work is slowed down to the speed of the elderly worker. Where they work with juveniles the juveniles often demand the adult rate of pay in order to have the same pay as elderly workers.’³⁹

The extent to which older women were useful as employees varied. Secondly, women’s accumulated knowledge and expertise were highly regarded by their employers. Although some women no longer had the strength or stamina to perform their old duties, they were valued in other roles such as inspectors. Examples of this were reported in many of the oral histories. A former jute worker herself, Diana Wilke’s mother worked in various capacities in the jute industry in her lifetime. She had a reputation for being a good worker and was fully employed in old age: ‘She worked. The foreman came for her every morning for her to be an inspectress, to find fault in the weaving...he’d come at 9AM, be sure she had her dinner, and bring her back at four in the afternoon. She was good at her work. This when she was seventy’.⁴⁰ Older women fulfilled their occupational and familial duties as an extension of their responsibilities over a lifetime.

³⁹ Nuffield Foundation, *Old People: Report of a Survey Committee on the Problems of Ageing and the Care of Old People* (1947), p. 92.

⁴⁰ *Interview with Diana Wilke*, Dundee (13 July 2004). Diana’s mother worked in this capacity in the 1950s.

Illustration E: Women Working in Dundee Jute Mill, 1900



[Source: Jute Workers (1900). (University of St Andrews Special Collection)]

This photograph is representative of the employee profile in the jute industry. In comparison with other photographs of textile workers later in the twentieth century (See Illustration F), scenes such as this indicate the adverse effect of work in the jute industry and poor quality of life over the life course. Further comparisons were made in this regard in a documentary about Dundee.⁴¹ While showing footage of women working in the jute mills and picking fruit for the jam industry, the narrator stressed the bad conditions in the factories, such as noise, dust, and risk of fire. Outdoor work was shown to be better for the overall health of workers: older women and children did not have the same look of chronic tiredness as the group assembled above.

⁴¹ Scottish Film Archive, *Auld Dundee* (1996).

Illustration F: Older Women Employed in Textiles, Fair Isle, Shetland



[Source: Women in Shetland (c.1950). (University of St Andrews Special Collection)]

Unlike the photograph of jutemill workers, the older women in this photograph are clearly in better health. Working conditions such as better ventilation and light acted in combination with a better quality of life in Shetland in the twentieth century.

Employment practices in the period of study are indicative of the rapid pace of industrialisation and urbanisation: responses to economic trends were specific to the industry. Development in labour relations was thus limited by the variability of these responses. Except for brief periods of decline in trade, the overarching need for a skilled labour force determined the retention of older workers. Within this context, older worker's place in the labour force was assured, and their duties as employees were relatively constant. However, their status was not homogeneous. Within their families and communities, older workers occupied a specific status: as a source of knowledge and expertise, their value as good workers was acknowledged. Out of regard for their seniority, accommodations were made to maximise their productivity in the workplace. However, differentials between various industries resulted in unequal experiences of work. Much of this can be attributed to management practices. As part of a process in which most industries were restructuring workplace technology and social relations in the last decades of the nineteenth century, employer/employee relationships became decreasingly paternalistic. Pressures within industry to remain competitive in a volatile economy diminished older workers' value over time. These latter economic processes will be interpreted in terms of transitional stages between full employment and retirement in the twentieth century.

**A RESERVE ARMY OF LABOUR?:
TRANSITIONS FROM WORK TO RETIREMENT, c. 1914-1999
(3.2)**

Employment opportunities for older people fluctuated in the twentieth century, hastening the process in which older workers withdrew from the labour market. The origins of this process were primarily economic. The contraction of Scotland's traditional industries during the inter-war period reduced demand for labour in general and disproportionately excluded older workers from the workplace. Full employment during the Second World War proved a temporary respite from the pressures of unemployment in old age, as change in the composition of the labour force in Scotland was precipitated by pension policies in the post-war decades. Mandatory retirement from regular employment was a condition for the receipt of occupational pensions and the state pension.⁴² Subsequent political and economic processes in the remainder of the twentieth century have further restricted older people's access to the labour market. For the most part, employers have been responsible for these restrictions over the long term. This can be attributed to reductions in the labour costs through redundancy in late-middle years, which has excluded an increasing number of older workers from full-time employment. However, offsetting this is the fact that many older people have chosen to retire at or before the pension age. An investigation of both processes raises two related questions: firstly, do older workers have a right to employment; and secondly, do older people have a right to retirement?

The foreshortening of people's work lives has resulted in a complicated period of transition between full employment and retirement. An assessment of this process suggests that periodic cycles of inclusion and exclusion from the labour market has resulted in a severe imbalance of power between employers and older employees.

⁴² BPP, *The Public General Acts*, National Insurance Act, 1946 (1946), Part II. 20 (1) Retirement ages for men was 65, and for women, 60.

Theoretical discourse in this regard addresses two aspects of these imbalances. Ageist policies, such as dismissal of older workers and early retirement, have been attributed to the institutionalisation of ageism in the workplace. Specific outcomes of these economic forces have been previously outlined: age discrimination encourages the view that past a certain age a person's worth is diminished, the income needs of older people are less than that of younger, and the elderly are an economic burden.⁴³ It can be argued that the association of chronological age with retirement has reinforced older workers' loss of bargaining power. Thus, the experience of work for older people must be understood as part of a transitional process in employer/employee relations in the twentieth century. Rather than examining power in terms of its origin, power relations have been studied in terms of practices in different institutional contexts such as the workplace. By studying the use of power, the behaviour of individuals is understood to be an instrument which shapes the dynamics of the group. Respectively, forces controlling the marketplace determine how power is exercised. These power relations characterise the manner in which men are governed by one another.⁴⁴ It can be understood that relations between employer and employee have been subject to larger economic forces and historical trends which have ultimately determined older workers' employability.

As a result of extraordinary economic circumstances in the first half of the twentieth century, employment patterns in the United Kingdom were unstable. The older worker's place in the labour market was consequently insecure. Two extreme examples of inclusion and exclusion from full employment in the period provide understandings of older people's role as a reserve army of labour. The first of these was the impact of total war. During the First World War, the British home front was fully employed. In addition

⁴³ O.R. Onken, "Ageism, Later Careers and the Law: An Examination of the Theoretical and Practical Problems of Enforcing Anti-Discrimination Statutes" (2007), p. 2. Age discrimination in the workplace has been addressed as an international phenomenon. S. Howell *et al*, "Management Attitudes to Older workers in the Retail Sector", *Monash Business Review* 2:2 (July 2006).

⁴⁴ M. Foucault, "The Subject and Power", in H.L. Dreyfus and P. Rabinow (eds), *Michel Foucault: Beyond Structuralism and Hermeneutics* (1982), p. 208.

to the massive diversion of manpower for direct participation in the war, women and older people normally excluded from employment were found work in a range of industries to support and supply the military effort, and run the home front.⁴⁵ Government purchases of goods stimulated growth in particular industries, such as the Dundee jute industry, which operated at full capacity during the war. These conditions had varying results upon the older female labour force. A review of accident reports in the period draws attention to the impact of overcrowding workers in the factories. Older women were injured resulting from machinery being placed too closely together and the introduction of less experienced employees in their proximity.⁴⁶ But full employment had its benefits. As an indicator of the demand for their labour, older jute workers earned bonuses to their regular wages in this period.⁴⁷ Therefore, the inclusion of older workers in wartime production was economically advantageous for individual employees as well as society as a whole.

The temporary boom in production during the First World War was almost immediately followed by severe economic decline. Trade depression and intense periods of unemployment punctuated the interwar period. In the 1930s, the Pilgrim Trust⁴⁸ studied the effects of long-term unemployment in Great Britain. It found that particular age groups were disproportionately out of work on a permanent basis. Respectively, specific areas such as Scotland experienced higher rates of unemployment. In 1931 unemployment in Britain in the twenty-five to forty-four age cohort was running at thirteen per cent. For those aged fifty-five to sixty-four it rose to 22.6 per cent and was

⁴⁵ C.H. Lee, "The Scottish Economy", in C. MacDonald and E.W. McFarland (eds), *Scotland and The Great War* (1999), p. 22.

⁴⁶ Sidlaw Industries Ltd (J and A.D. Grimond Ltd.), *Register of Accidents 1896-1935* [UDA MS 66/IV/7/1].

⁴⁷ Baxter Bros & Co Ltd, *Wages and Salaries 1854 – 1959* [UDA MS 11/3/13].

⁴⁸ Edward Stephen Harkness of New York founded the Pilgrim Trust in 1930 by endowing it with a capital sum of just over two million pounds. The donor desired that the gift should be used to give grants for some of Great Britain's more urgent needs and in promoting her future well-being. <www.thepilgrimtrust.org>

projected by the Trust to be far more likely to be long-term.⁴⁹ Indeed, the prognosis for unemployed older workers was grim:

Older men were brought up with a different outlook and different standards from those which come to the younger generation, and many of them feel that they cannot be satisfied with the rest of their lives lived out on the dole. Anyone who has visited a number of these older men knows the hopelessness of men faced with an empty future- whom neither education nor work has ever given an opportunity to learn how to spend leisure.⁵⁰

The experience of unemployment among older age groups in Scotland and the rest of Britain was a universal problem. However, regional variations in the degree of trade depression intensified older people's exclusion from the labour market. Forty per cent of Britain's unemployed were concentrated in Scotland's four staple industries: coal mining, steel manufacture, shipbuilding, and textile manufacture. In the hardest hit industrial areas in Scotland, unemployment ran at 60 per cent and for the three-year period 1929-1932 unemployment averaged 30 per cent in Glasgow.⁵¹ In comparison to the male population as a whole, older men in Scotland were most affected by unemployment in the inter-war period.

Because the Pilgrim Trust study and other contemporary reports⁵² tended to concentrate on men's experiences of unemployment between the wars, older women's experiences of unemployment at this time are less understood.⁵³ Social historian John Burnett's broad investigation of the historical experience of unemployment in late modern Britain provides an explanation as to why men's experiences have been examined more closely: 'Male unemployment was much higher than female, mainly because with the exception of the cotton industry, women tended to be employed in

⁴⁹ The Pilgrim Trust *Men Without Work* (1938), Table 2, p.13.

⁵⁰ Pilgrim Trust, *Men Without Work*, p. 179.

⁵¹ Pilgrim Trust, *Men Without Work*, Table 5, pp. 17-18.

⁵² Ministry of Labour, *Reports of Investigations Into the Industrial Conditions in Certain Depressed Areas* (1934).

⁵³ J. Ginn and S. Arber, "Gender, Age and Attitudes to Retirement in Mid-Life", *Ageing and Society* **16:1** (1996). Ginn and Arber consider it to be a problem that British research on exit from the labour market has been concerned with men in isolation.

more stable occupations'.⁵⁴ However, Burnett's interpretation needs to be qualified in respect to the Scottish experience. Firstly, separate analyses of older women's employment records throughout Britain indicated that unemployment among married women was particularly high.⁵⁵ A breakdown of participation in women's occupations in Scotland based on conjugal status indicates that a disproportionately higher number of single women were in employment, and that in some occupations there were more widowed employees than married ones. It should be noted that there were less widowed employees in 1931 than 1911. Married women in their early thirties and late middle years composed the majority of women who lost their places in agriculture, domestic service, and in the service industry, mainly as shop assistants.⁵⁶ Secondly, a careful study of census material measuring older women's experience of unemployment shows that some areas were devastated by unemployment. Like the cotton industry, the jute industry contracted during the 1930s, and dismissed approximately half of its older female employees.⁵⁷ In past censuses, the proportion of older women in jute was roughly five times that of the national figure measuring the percentage of older women employed in the textile industry as a whole. In 1931, the percentage of women aged 55 and above occupied in the jute industry was lower than the national figures measuring the percentage of women in the same age group employed in the textile industry.⁵⁸ Because jute was such an important employer of older women in Dundee, this was significant. Unemployment in the interwar period was arguably more of a universal experience between older men and women in Scotland than in other parts of Great Britain.

⁵⁴ J. Burnett, *Idle Hands: The Experience of Unemployment 1790-1990* (1994), p. 206.

⁵⁵ S. Glynn and J. Oxborrow, *Interwar Britain: A Social and Economic History* (1976).

⁵⁶ BPP, *Census of Scotland, 1931* (1933).

⁵⁷ Comparisons between the Scottish 1911 and 1931 Census substantiate Burnett's general thesis in terms of women's employment in domestic service and other service industries. Jute was therefore exceptional. BPP, *Census of Scotland, 1911*(1912) and BPP, *Census of Scotland, 1931* (1933).

⁵⁸ BPP, *Census of Scotland, 1911*(1912) and BPP, *Census of Scotland, 1931* (1933).

Political and economic processes in the 1940s reflected a period in transition: the contradictory effects of full employment in the war years and post-war boom and subsequent retirement pension policies transformed older workers' access to the labour market. This can be viewed in stages. Rearmament in the late nineteen thirties resuscitated heavy industry, which brought about a degree of economic recovery throughout Scotland.⁵⁹ Clydeside⁶⁰ was fully occupied with essential war work throughout the Second World War. Demand for labour intensified in other industries as well. In an economic environment comparable to the conditions of the First World War, older workers played an important part in the Scottish economy during the war. Just as the jute industry boomed at this time, so too did the brewing industry. Older skilled employees and supervisors were given numerous bonuses during the war.⁶¹ A number of retired older workers were in such great demand for their expertise that they were invited back to the firm for full-time 'consultation', and other older employees' requests to retire were denied 'for the duration'.⁶² Such demand was short-lived; older workers' status in the labour market was profoundly altered by post-war legislation. Suspended by imperatives of the war, social reforms such as old age pension policies were shelved in Westminster until 1946.⁶³ In terms of employment, the most significant outcome of National Insurance legislation was the provision of a state pension upon retirement at a set age. The impact on older employees was double-pronged, because an increasing number of firms in Scotland instituted occupational pensions at this time, which also

⁵⁹ R.H. Campbell, *The Rise and Fall of Scottish Industry, 1707-1939* (1980).

⁶⁰ A concentration of heavy industry, including coal mining, iron and steel production and ship building, was located in the west of Scotland, in the area along the River Clyde.

⁶¹ William Younger and Co Ltd., Salaries Book (1938-1940) [UGA WY 12/2/5].

⁶² William McEwan & Co Ltd., Private Minutes (1918-1959) [UGA SNM1/6/2/1].

⁶³ William Beveridge drafted his recommendations for old age policies in 1942 in the middle of the war years. It was not until after the end of the war that the newly elected Labour Government passed welfare state legislation in 1946. The fourth chapter of this thesis provides further explanation as to the political implications of Government's implementation of Beveridge's recommendations.

established age requirements. Formalisation of pension policies by employers in the post-war period raises issues concerning older workers' rights and choices in their economic career.

The institution of occupational pension policies in the post-war period was based on pre-existing practices in Scottish industries. Developed in the nineteenth century as an extension of paternalism, company *ex gratia* pensions were paid to employees and their dependants upon retirement.⁶⁴ However, such practices had their limitations, as very few companies established these financial arrangements for their employees until the twentieth century.⁶⁵ Exceptions such as the thread manufacturers J&P Coats of Paisley and the Scottish brewing industry provided employees upon retirement with either lump-sum or annuitized non-contributory pensions.⁶⁶ The provision of retirement pensions was conditional and as such they were granted with the proviso: 'During the Pleasure of the Board'.⁶⁷ The implications were that if the retired worker failed to satisfy the Board in terms of moral character, then pensions could be withdrawn. Drunkenness, for example, could disqualify further receipt of a pension.⁶⁸ The underlying principles of pension provision in this period influenced the formation of occupational pensions in the 1940s and beyond. Documents outlining pension requirements at the time are indicative of the unequal provision of occupational pensions in later years. In the short term, age stipulations and the introduction of worker contributions discouraged older workers from remaining in employment past a certain age. In the long term, exclusion of female and part-time employees from some occupational pension schemes coupled with the loss of entitlement to employer 'matching' contributions if they had not been

⁶⁴ L. Hannah, *Inventing Retirement: the Development of Occupational Pensions in Britain* (1986), p. 19.

⁶⁵ The jute industry did not provide occupational pensions to wage earners.

⁶⁶ Lump-sum payments were paid in full upon retirement. Alternately, former employees were paid a weekly pension wage. Generally, the latter method was used in the brewing industry. William McEwan & Co Ltd., Wages Books (1896-1900/1901-1913) [UGA SNM8/3/2/13-14].

⁶⁷ William McEwan & Co Ltd., Private Minutes (1918-1959), [UGA SNM1/6/2/1].

⁶⁸ William McEwan & Co Ltd, Entry dated 22 March 1939, in Private Minutes (1918-1959), [UGA SNM1/6/2/1].

employed long enough for the firm, profoundly impacted older workers' choices.⁶⁹ Furthermore, many industries failed to adopt such schemes altogether. As a consequence, older workers were divided between individuals who had to remain in various forms of employment well into old age and those who could afford to retire at or before formal retirement ages.

The establishment of a set retirement age in occupational pension schemes and the National Insurance Act instigated an immediate withdrawal of a large group of men and women of retirement age from the workforce. Arguably, this process was hastened by employer's policies rather than the adoption of formal pensions, given the requirement of contributions over time. The number of retired males doubled between 1931 and 1951, and the number of women tripled in this period.⁷⁰ Accompanying data reported in the 1951 Census was an explanation about the significance of these demographic trends:

No doubt it may be inferred from this [the substantial increase in the proportion of retired males] that the general increase in the rates and range of pension allowances played their part in facilitating retirement. As regards the decreases shown at younger [middle] ages the explanation may be that the proportions in retirements at all ages might have been lower in 1931 but for the intense industrial depression at that time and that many who would have been prepared to work preferred to return themselves as 'retired' rather than as seeking work of which there was no prospect.⁷¹

Retirement trends in 1951 can be further explored in terms of regional variation. Comparisons between Scotland's four cities, Aberdeen, Dundee, Edinburgh, and Glasgow reflect the distinctive occupational profile of each city. The gendered experience of retirement from work is thus relative to the particular region people worked and lived in their entire lives. For example, in Glasgow the male to female ratio

⁶⁹ George Younger & Son Ltd., Pension and Life Assurance Schemes (1948; 1959; 1961), [UGA GY 8/4/2-4]

⁷⁰ BPP, *Census of Scotland, 1931* (1933); GRO, *Census of Scotland, 1951* (1952).

⁷¹ GRO, *Census of Scotland, 1951* (1952), p. xviii.

on the basis of retired status was 6:1 in 1951, whereas in Dundee just under a third of the total retired population were women.⁷² The differentials under these circumstances were tremendous. Low participation rates of women in the workplace in Glasgow resulted in a large population of women completely reliant upon their husband's wages or salaries, and respectively, their pensions in old age. As a contrast, a greater proportion of Dundonian women in old age qualified for the state pension in their own right. Thus older women in Dundee were more independent financially as employees and in retirement. These circumstances were a distinctive feature of this age cohort; subsequent employment records produced a more even distribution of retired men and women. The dramatic increase in numbers retiring from work in the immediate post-war years throughout Scotland only tells part of the story; older men and women who were retired were outnumbered at a rate of 3:1 by those above the age of retirement who remained in employment.

A stronger economy in the post-war period affected employment policies, which assisted the retention of older people in the labour force. Indeed, an older workforce was essential in declining industries which failed to attract younger workers.⁷³ The Royal Commission on Population (1949) argued that: prolonging active working life appeared to be the best solution for striking a balance between too many elderly people and too few workers. The Commission's report must be understood as a response to demographic projections that older age populations were increasing and the government's dread of a dependent population group. Thus formal studies in the period stressed that older workers were capable and skilled; these contrasted sharply with reported ageist policies in the workplace which were obstructing older workers' entry into the labour force. The suitability of 'elderly workers' was emphasised in the Nuffield

⁷² GRO, *Census of Scotland, 1951* (1952).

⁷³ C. Morelli and J. Tomlinson, "Women and Work after the Second World War: a Case Study of the Jute Industry, 1945-1954" (Unpublished paper, 2006).

Foundation's survey on the old in employment: few adaptations were necessary for older employees and that they were more reliable.⁷⁴ Institutional ageism was also critiqued in the literature, an indication that a mandatory age of retirement was inappropriate in periods of full employment. For example, psychologist A.T. Welford argued that chronological age was a poor guide to understanding work capacity and ability.⁷⁵ Although it is clear that older people's role in the labour force was in demand in the post-war boom, a critical reading of these sources suggests that these were only temporary measures. A contemporary observed: 'At [this] time the demand for labour was almost as great in any of the preceding war years, however, and it was thought that under these circumstances the proportions of older persons in employment would be the maximum that could be expected under conditions of full employment'.⁷⁶ Ultimately, ageist employment policies were entrenched to the effect that in bust cycles, older workers were believed to be unsuitable for the job.

Prosperity in the post-war period did not immediately improve the socio-economic conditions in Scotland's cities. This can be viewed as a continuity of economic trends originating at the turn of the twentieth century. Scottish industry had been in decline since 1918 and in the post-war period, almost all sectors had collapsed. In the immediate period after the Second World War, it was recognised that a change in direction was required.⁷⁷ Industrial areas most adversely affected by these events attracted and encouraged new industries. Many of these were multinational manufacturers and light industries. American-owned National Cash Register (NCR)⁷⁸ and Timex soon emerged as principal industries in Dundee. Such developments helped to absorb the

⁷⁴ Nuffield Foundation, *Old People: Report of a Survey Committee on the Problems of Ageing and the Care of Old People* (1947), p. 89.

⁷⁵ A.T Welford, *Ageing and Human Skill* (1958), pp. 4-10.

⁷⁶ G. Thomas, "The Employment of Older Persons, Social Survey" (1947), p. 2.

⁷⁷ R.H. Campbell, *The Rise and Fall of Scottish Industry, 1707-1939* (1980).

⁷⁸ NCR corporation selected Dundee as the base of operations for the UK in late 1945, and production began in 1947. In January 2007, NCR cut 650 jobs in Dundee to turn the company over for low volume production. NCR, "NCR to Restructure Global Manufacturing Operations in its Financial Self-Service Business" (11 January 2007) <www.ncr.com>

unemployment caused by the decline of the jute industry. The introduction of these firms provided men and women with a significant source of employment; younger men in particular were the beneficiaries of these opportunities. The social effect of this had several ramifications. By 1971, male employment was twice the rate of female economic activity.⁷⁹ For the first time in over one hundred years, Dundee's employment profile was in line with national trends. However, the effect of relatively full employment for Dundee's male population dramatically impacted women's roles in their households. No longer primary earners, women had to negotiate differently with men as a consequence. Recollections of this time were commonly shared among older women in the case study oral histories:

‘Things were so hard before the war, that when we both had jobs... I was in the mills, and my husband was a boxer...it was a relief. Many folk, especially men, were chronic out of work. We knew it would come to an end. Then the NCR came, and George found work first. He was paid so much so that I didn't have to go back until my daughter was in school. After a couple years there, I left... I trained to be a nurse. We thought we were in riches’.⁸⁰

Unusually, this age cohort experienced relatively full employment for a majority of their working lives. The exceptional nature of these patterns of employment can be explained in terms of subsequent economic trends.

In the last quarter of the twentieth century, Scotland suffered an economic crisis with a steady contraction of its manufacturing base along with a process of industrial and corporate restructuring. The 1970s saw an end to post-war growth and between 1976 and 1987 Scottish manufacturing output fell by 30.8 %.⁸¹ In places exhibiting a high degree of dependence on single industries and/or multinationals, such as Dundee, shifts in corporate strategy could have disastrous consequences for the local economy. Over 6,000

⁷⁹ GRO, *Census 1971 Scotland* (1973).

⁸⁰ *Interview with Bet Park, Broughty Ferry* (19 May 2004).

⁸¹ Devine, *The Scottish Nation*, p. 592.

jobs in Dundee were lost in the first half of the 1970s, mainly due to the closure of NCR's mechanical cash register production. Employment patterns in Dundee changed dramatically during the 1980s with the loss of nearly 10,000 manufacturing jobs due to closure of the shipyards, cessation of carpet manufacturing and the disappearance of the jute trade.⁸² The last jute factories had by then closed down along with other industries. The Timex dispute marked the final stages of the decline in Dundee's manufacturing industries, resulting in high unemployment in the city, and an overall uncertain economic future for the city's workforce.⁸³ The closure of Timex in 1993 was particularly significant from an economic perspective, given its role in providing employment in the area in the years following the Second World War. Dundee's economic decline in the latter decades of the twentieth century was representative of many regions in Scotland at this time.

As a response to the long-term consequences of economic decline and the emergence of unemployment in Scotland as well as the rest of Great Britain, government and employers made use of various early retirement policies in this period. An example of institutional ageism, the government's job release scheme, which operated between 1977 and 1988, allowed specific categories of older workers to retire early: 'Temporary allowances [shall be provided] to persons approaching pensionable age, under schemes made and implemented with a view to creating job vacancies and otherwise mitigating the effects of high unemployment'.⁸⁴ The condition was that unemployed school leavers would fill these vacancies. During this period, no more than 12% of eligible middle-aged men⁸⁵ participated in this scheme. It has been suggested that because benefits were flat-rate rather than earnings related, take up of the scheme was low.⁸⁶ The exclusion of older people from full-time work continued into the 1990s through the operation of

⁸² J. Doherty, "Dundee: A Post Industrial city" in C. Whatley, (ed.) *The Remaking of Juteopolis: Dundee c. 1891–1991*, (1992) pp. 24–39.

⁸³ "Timex: Dundee's Dispute" *The Economist*, 29 May, 1993.

⁸⁴ BPP, *Job Release Act 1977* [Eliz. II] (1977), I (1).

⁸⁵ Although the scheme was available to women as well, very few took part.

⁸⁶ F. Laczko and C. Phillipson, *Changing Work and Retirement* (1991), pp. 49–50.

employers' occupational pension schemes and early retirement policies in the United Kingdom. The use of early retirement has been described as a managerial tool, with which employers used mainly voluntary redundancy packages to shed labour under favourable terms.⁸⁷ Scotland's weaker industrial position in the period suggests that employers north of the border opted to make workers unemployed rather than provide redundancy policies, which carried higher financial costs. Thus, Scotland lagged behind England in this respect. Similarly, the role of occupational pensions in this process was constrained in Scotland, given that in 1979 no more than half of the Scottish labour force was covered by an occupational pension.⁸⁸ Nonetheless, Scotland's early retirement patterns over the period were in close alignment with those in the UK as a whole⁸⁹ (see Tables 3.7 and 3.8). In a study of 500 large employers in the UK, including Edinburgh, this was explained: 'It was easier to negotiate early retirement to those close to retirement age when they needed to shed staff quickly'.⁹⁰ Differentials can be explained on the basis of a slightly higher percentage of working-class employees in Scotland, who would not have participated in such retirement schemes.

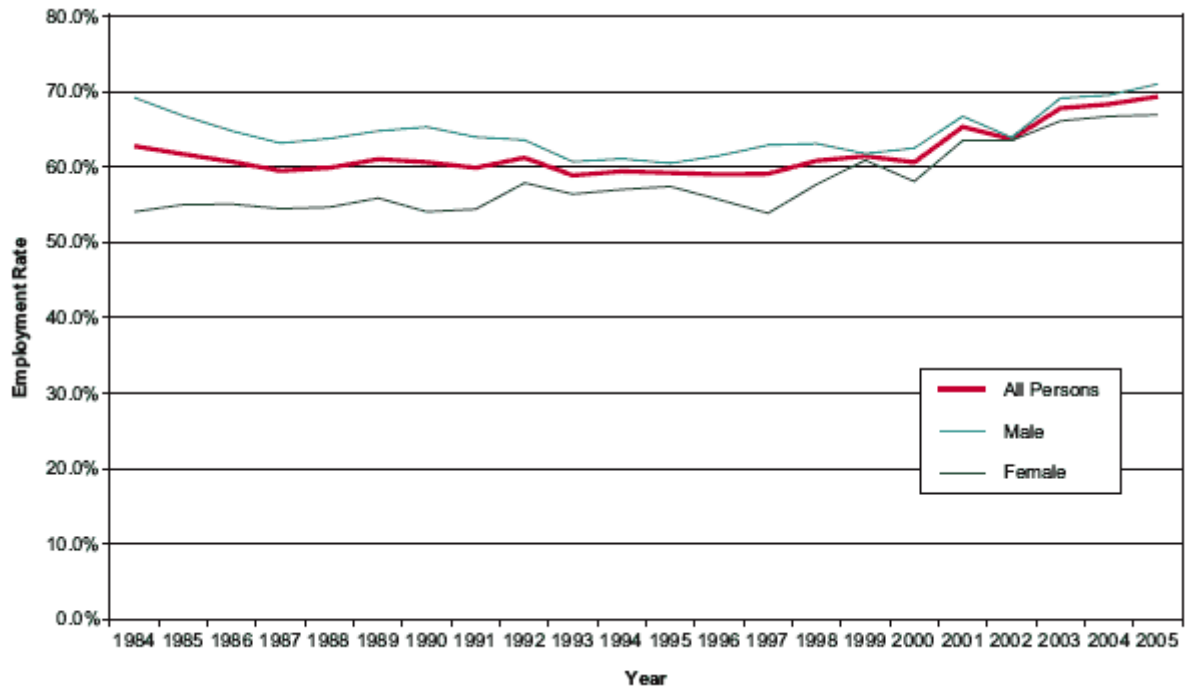
⁸⁷ D. Hirsch, *Crossroads After 50: Improving Choices in Work and Retirement* (2003), p. 15.

⁸⁸ A. Grimes, "Pensioners in Poverty", in G. Brown and R. Cook (eds) *Scotland the Real Divide: Poverty and Deprivation in Scotland* (1984), p. 138.

⁸⁹ BPP, Office of Population Censuses and Surveys, (OPCS) Social Survey Division, *General Household Survey* (1991).

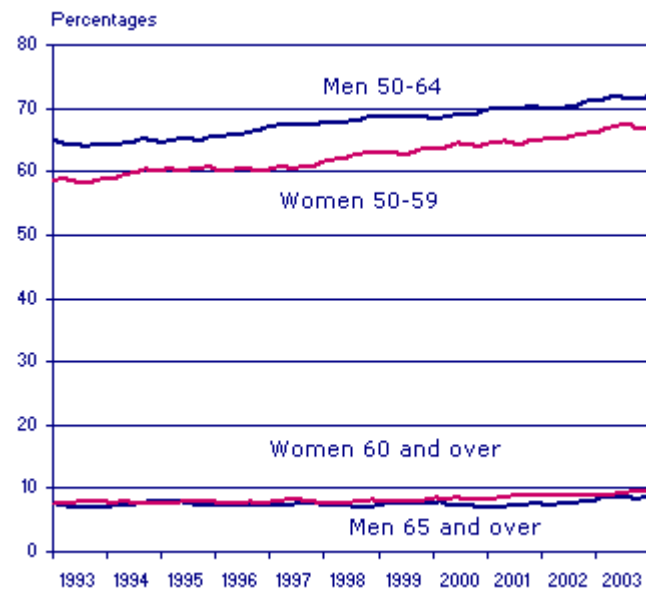
⁹⁰ P. Taylor and A. Walker, "Employers and Older Workers: Attitudes and Employment Practices" *Ageing and Society* **18** (1998), p. 642.

Table 3.7 *Employment Rate, 50 to State Pension Age, Scotland 1984 to 2005*



[Source: Compiled by Scottish Executive Labour Market Statistics Branch. "Older Working Lives" *All Our Futures: Planning For a Scotland With an Ageing Population* (March 2007)]

Table 3.8 *Older People in the Labour Market in the UK, 1993-2003*



[Source: National Statistics, *Older People* (May 2004)]

Disinclination to retire early influenced many older workers' decisions to enter part-time work instead. Thus, early exit from full-time employment can be understood as part of a larger trend in which men and women below retirement age worked part-time.⁹¹ This trend has been explained in terms of employee's agency: "These flexible types of employment are often referred to as bridge jobs as they can bridge the gap between a full-time career position and fulltime retirement, and thus prevent premature exit from the labour market".⁹² Numerous studies conducted over the past twenty years have assessed part-time work patterns in terms of gender and age. The General Household Survey in the period 1973-1991 showed an overall increase of part-time work among people aged 50 and above.⁹³ Employment data compiled in the period 1986 to 2001 indicated that the proportion of men aged 50-65 in part-time work doubled whereas women's roles as part-time workers were fairly stable in the period. The Labour Force Survey found that 38 per cent of men and 55 per cent of women left full-time employment for part-time work in the late 1990s.⁹⁴ Analysis of these figures reveals that these employment transitions were extremely varied. The most significant variable was the rationale for entering part-time work in middle years; men and women cited different reasons for leaving full-time work. While men chose to work part-time for social reasons, women specifically undertook part-time work for more flexibility to provide informal care for family members. These choices were indicative of the persistence of unequal status on the basis of gender in the work place as well as within Scottish society.

⁹¹ A. Hunt, *The Elderly at Home: a Study of People Aged Sixty Five and Over Living in the Community in England in 1976* (1978), p. 58.

⁹² E. Whiting, "The Labour Market Participation of Older People", *Labour Market Trends* (2005), p. 290.

⁹³ OPCS, *General Household Survey*. (1973); BPP. OPCS, *General Household Survey* (1981); OPCS, *General Household Survey* (1991).

⁹⁴ Labour Force Survey, "Population of Working Age: by Employment Status and Gender, Spring 1986 and 2001" (2001), table 4.3.

By the end of the period of study, it was clear that several problems had emerged from employment and retirement policies in Great Britain. For the most part, older women continued to be at a social and economic disadvantage. While much of this originated in unequal statutory pension policy in the 1940s⁹⁵, employers have played an equal part in this process.⁹⁶ Recent examinations of unequal occupational pension provision and low status in the workplace specifically point to the demands on middle-aged women for the provision of informal care.⁹⁷ In a comparative study of the Social Change and Economic Life Initiative (SCELI) and the British Household Panel Study (BHPS), Shirley Dex *et al* examined the correlation between low pay, part-time work and informal care. In general, informal carers were middle-aged women who cared for elderly relations, and as a consequence they tended to earn less than their younger counterparts. Primarily, this was because they worked part-time in sectors such as the service industry and agriculture which traditionally paid women less, and usually did not provide an occupational pension.⁹⁸ In the 1991 BHPS study, 69.2% of women earning low pay were employed in industries in which the employer did not provide a pension scheme.⁹⁹ The economic implications were that women who were paid less in middle years would suffer deprivation for the remainder of their lives; in the short term because they were earning less, and in the long term because they often failed to accumulate an adequate pension. The gendered experience of informal care in Scotland further illustrates the failure of industry to keep apace with the caring responsibilities of middle-aged women.

Recent examinations in Scottish industry indicate that the demand for more flexible and non-standard forms of employment increased among older workers and the

⁹⁵ The role of the Welfare State will be examined in chapter 4 of this thesis.

⁹⁶ The income gap between older people retiring on occupational and personal pensions and those who had to rely on state pensions and benefits remained substantial. Joseph Rowntree Foundation, "Risks of Old-Age Poverty for Those Retiring Early Are Strongly linked to Occupation" (29 April 2002).

⁹⁷ Social Change and Economic Life Initiative (SCELI), (1986); British Household Panel Study (BHPS), (1991); S. Dex, S. Lissenburgh; M. Taylor, *Woman and Low Pay: Identifying the Issues* (1994).

⁹⁸ Part-time work has been defended on the grounds that it is more flexible. A. Dale and C. Bamford, "Older Workers and a Peripheral Workforce", *Ageing and Society* **8:2** (March 1988)

⁹⁹ Quoted in Dex, Lissenburgh, and Taylor, *Woman and Low Pay*, p. 77.

general population by 1999. A study conducted for the Scottish Executive highlighted the way older people's aspirations about ways of working and retirement reflected the demands of informal provision of care and flexibility in their places of work. The findings suggested that older workers had specific unmet needs in this regard.¹⁰⁰ For example, the study showed that 84% thought employers should offer part-time work to those near retirement age in order to retain them, and 92% should invest money in changing working practices. These particular issues were applied in a wide-scale study. In 1996, Scottish private sector employers' policies were examined with regard to flexible working arrangements for carers of physically and mentally impaired older people.¹⁰¹ A questionnaire concerning employers' attitudes towards care-giving employees was completed and returned from 319 Scottish companies. Of these, 75% were located in the Central Belt and Tayside. There were two significant findings: firstly, only one of the 319 companies actually had a policy as regards care-giving workers in terms of time off or pay; and, secondly, companies were relatively unaware of the numbers or needs of older middle-aged employees with care-giving responsibilities for older disabled relatives. Specifically, 92% had never considered it.¹⁰² The authors of this study make a strong case for flexibility in carers' working arrangements in Scottish industry, saying that: "These are important questions because more women, the traditional carers of frail old people, are employed, and because policy is firmly about care *in* and *by* the community".¹⁰³ The failure of industry to make accommodations for informal caring responsibilities is indicative of the divergence between business practices and government policy. It can be argued that this incongruence has reinforced the problem of socio-economic inequalities between older men and women upon retirement from employment.

¹⁰⁰ L. Williams and A. Jones, *The Ageing Workforce* The Work Foundation. (2005)

¹⁰¹ M.L.M. Gilhooly and C. Redpath, "Private Sector Policies for Caregiving Employees: A Survey of Scottish Companies" *Ageing and Society* **17** (1997).

¹⁰² Gilhooly and Redpath, "Private Sector Policies for Caregiving Employees", p. 411.

¹⁰³ Gilhooly and Redpath, "Private Sector Policies for Caregiving Employees", p. 400.

Older people's diminishing roles in the workplace in the twentieth century raises several issues in terms of the rights of citizens. An assessment of these rights must first rest upon an understanding of economic processes and occupational patterns in the nineteenth century. At that time, inclusion in the labour market provided many older people with economic independence and status in their communities. Their involvement in the labour market was a norm. In periods of economic decline, exclusion from the labour market was not particularised by an individual's age, but by the conditions of the industry. Thus older workers' access to the workplace was a general right of citizenship. Although many women in Scotland were not included in this model, it is clear that in terms of women who did participate in the labour market, they were not excluded on the basis of age either. Such rights of citizenship have in the intervening years been incorporated with a separate set of rights: the right to retire. In the twentieth century, these have operated as functions of the economic life cycle in periods of full employment, and as oppositional forces in times of trade depression and unemployment. In the first instance, older people's inclusion in the labour market enabled them to participate in the short-term processes of earning income through their labour, and the long-term imperative of building a resource base for the experience of retirement. The right to work thus determined the right to retire. However, a combination of historical events and specific policies operated as limits to these rights in the twentieth century. Unequal access to the labour market in periods of massive economic decline curtailed the right to work; institutionalised policies resulting in exclusion from the workplace further limited many older people's rights to save for a good retirement.

**THE 'MODERN' EXPERIENCE OF RETIREMENT
IN SCOTLAND, c. 1845-1999
(3.3)**

A social outcome of economic patterns and pension policies introduced in the United Kingdom during the twentieth century was the phenomenon of universal retirement. As an historical process, retirement was exceptional because it did not evolve in line with demographic change. For instance, the doubling of percentages of men aged 65 and above between 1901 and 1941¹⁰⁴ had a negligible impact on the rate of formal retirement from employment in the same period. Formalised age limits in statutory old age pension legislation and occupational pension schemes in the 1940s revolutionised the socio-economic experience of growing older: a right in the British Welfare State, retirement became a rite of passage for all older citizens. Although the invention of retirement¹⁰⁵ was a product of political and economic imperatives, retirement from employment immediately functioned as a social demarcation between younger and older populations. Thus retirement from employment could be understood as the onset of old age. Over time, retirement as a social process determined the experience of old age in terms of identity, personal aspirations, and daily life. These fundamental aspects of the older self have been addressed in sociological and psychological studies of the experience of retirement in the late modern period. A progressive overview of these analyses has produced several questions concerning the meaning of retirement. How were older people's retirement practices in the post-war period influenced by those in earlier

¹⁰⁴ Although the census was not taken in 1941, the general proportionate increase reflected longitudinal population growth in the twentieth century. Because the census did not provide separate information about retirement until 1951, retirement data is included in general economic inactivity rates by age.

¹⁰⁵ L. Hannah argued that compulsory retirement age limits in Welfare State legislation in 1946 in combination with the development of occupational pensions 'invented' the twentieth century experience of retirement. Economic interpretations such as Hannah's provide insights into the political and economic forces which extended the right to retire. L. Hannah, *Inventing Retirement: The Development of Occupational Pensions in Britain*, (2006), pp. 53-54, 128-132.

periods? Is retirement a transition to a new life or a continuation of a past one?¹⁰⁶ The qualitative experience of retirement in Scotland evolved from a social experience shared by a minority of the population to a universal social transition in the life course among older population groups in the late modern period.

Modern discourse involving the meaning of retirement has its origins in the institution of a set retirement age in the post-war welfare state. Mandatory retirement was challenged in the post-war period in terms of economic disadvantage and loss of status. Social surveys and interviews addressed these issues in several ways, providing both quantitative and qualitative arguments to the effect that older people (men) should continue in full-time employment. The premise for formal studies in Britain such as the Nuffield Foundation's *Old People* (1947) and Dr J.H. Sheldon's *The Social Medicine of Old Age* (1948) rested on older workers' potential and particular sets of skill.¹⁰⁷ In the immediate post-war boom, such considerations reflected economic pressures for a fully-employed citizenry rather than any particular concern for older people's social well-being. Social loss resulting from retirement was addressed in later periods. Suggesting that universal retirement restricted older men's access to social resources, social scientist B.E. Shenfield argued:

The satisfaction derived from carrying on a craft or profession may outweigh considerations of leisure...the second factor which may be combined with it is the fear of loss of status and the narrowing opportunities remaining to him... Position in an occupational group gives opportunity for the display of personality and the development of relationships which have significance for the individual. Allied to this belief that continued employment is beneficial for some old people, there is further argument that it is a matter of social justice to remove unfair discrimination based only upon chronological age, which deprives active older citizens the right to work.....¹⁰⁸

¹⁰⁶ The latter question was briefly argued in favour of a new life in A. Blaikie, *Ageing and Popular Culture* (1999), p. 7.

¹⁰⁷ Nuffield Foundation, *Old People: Report of a Survey Committee on the Problems of Ageing and the Care of Old People* (1947); J.H. Sheldon, *The Social Medicine of Old Age* (1948); B.E. Shenfield, *Social Policies for Old Age: A Review of Social Provision for Old Age in Great Britain* (1957).

¹⁰⁸ Shenfield, *Social Policies for Old Age*, pp. 58, 83.

The loss of social capital which Shenfield alluded to was an important influence in Peter Townsend's study of older people and their families in London in the 1950s. Although Townsend did not argue that employment was superior to retirement (as Shenfield had done), he did illustrate how many working-class men were affected in the short term by the loss of social networks and dramatic changes to their daily lives, saying: "They felt a blow had been struck at their prestige in both locality and family. In time they were able to reconcile themselves to the reality of being old age pensioners".¹⁰⁹ Mandatory retirement policies thus required adjustments in society in general and among working men in particular.

Empirical studies of retired men's experiences of social exclusion in modern welfare states such as Great Britain were integrated into international theoretical discourse in the social sciences. A group of sociologists and psychologists in Europe and America explored the meaning of 'retirement' in the 1960s. Influenced conceptually by the correlation of retirement with withdrawal from the labour force, research agendas and theoretical discourse were developed in this context. Some of the most thought-provoking explorations of the social construction of retirement in the 1960s and 70s were the most pessimistic: 'Once the worker has grown old he no longer has any place on earth because in fact he was never given one. When he discovers the truth he falls into a kind of bewildered despair'.¹¹⁰ The extreme position of this extract was a useful tool for asking difficult questions concerning the reproduction of economic inequalities in old age, and the experience of social death upon retirement. The latter provided scope for contemporary arguments stressing the relationship between retiral from employment and retirement itself. This process has been examined in psychological theories which investigate the meaning of social involvement over the life course. Known for

¹⁰⁹ P. Townsend, *The Family Life of Old People* (1957), p. 168.

¹¹⁰ S. de Beauvoir, *The Coming of Age* (1970), p. 274. De Beauvoir's assessment of old age was based on this principle: 'Old and poor is almost a tautology'.

interpreting psychosocial development in a series of stages¹¹¹, psychologist Erik Erikson established a theoretical model on ageing as an argument against disengagement theories developed in the 1960s.¹¹² Addressing the retirement process in stages, Erikson viewed mandatory retirement as a challenge to vital involvement. In terms of the immediate period after retirement, he suggested that crisis was a feature of withdrawal from the labour market:

The moment of retirement itself may be a shocking encounter with the transition about to be made. For the unprepared, for those whose creativity and involvement in work has been of major importance and whose identity was largely derived from that work, there can be a bitter and deprived feeling of being expelled and depreciated.... By relegating this growing segment of the population to the onlooker bleachers of our society, we have classified them as unproductive, inadequate, and inferior.¹¹³

The correlation between disinvolvement and retirement had a sell-by date as well; the function of retirement as a distinct social process in the life course underpinned theoretical development in this area for the remainder of the period.

New definitions of retirement as an extension of the individual's life career reflected demographic patterns and practices among older age cohorts after 1970. Improved life chances extended the period of retirement¹¹⁴, which required individuals and society to construct meaningful definitions of the process as a group experience, and to identify individuals' social roles in old age. The integration of the micro and macro processes of retirement was the basis for Erikson's later theories: vital involvement during retirement hinged upon the individual's 'reconciliation of who they were during their lives with a newer, ever-changing sense of who they may yet come to be in old

¹¹¹ E. Erikson, *Childhood and Society* (1950).

¹¹² One of the more heavily critiqued disengagement theories was E. Cumming and W.E. Henry, *Growing Old: The Process of Disengagement* (1961).

¹¹³ E. Erikson, *et al*, *Vital Involvement in Old Age* (1986), pp 298-299. Some of the material in this text dates from an earlier period, as *Vital Involvement* was the culmination of a longitudinal case study of a collection of families in Berkeley, California over a sixty-year period.

¹¹⁴ This has been explained as the result of better health and quality of life in most of the twentieth century. See the demographic section of chapter two for further explanations.

age.¹¹⁵ The inclusion of both gender's experiences of this process in retirement is important in these analyses:

Postretirement involvements...were motivated internally, practiced on the basis of self-discipline, and evaluated on the basis of intrinsically experienced adequacy. Retirement has freed most of the men from their overriding life's work of earning a living, and several of them are for the first time able to evaluate how well they can use their capacities in personally chosen activities. In contrast to the job-related paradigm of accomplishment that is experienced primarily in terms of external rewards received, these men [were] deriving satisfaction from the experience of competence as integral to activity itself.¹¹⁶

While the men in the study regarded retirement as freedom from the need to earn a living, women in Erikson's study regarded later life as liberation from the lifelong link between domesticity and female adequacy. Upon reaching retirement age, they expressed relief to have an excuse to develop new and different interests. Self-declared freedom from one sphere of industriousness provided an opportunity to take advantage of new, hitherto unexplored domains.¹¹⁷ The emergence of self-actualisation and empowerment as psychological processes functioned as methods with which older men and women integrated the status of retirement¹¹⁸ with their identity as older people. By removing the requirement of retiring from employment as the constituent of 'retirement', older women were included in this process.¹¹⁹ Retirement was understood to be a universal experience of psycho-social development in the individual life cycle.

The role of the individual provided the basis for recent approaches to the experience of retirement in British gerontology. By incorporating life course theory and postmodernism, retirement practices were defined in relation to the individual's life

¹¹⁵ Erikson, *Vital Involvement*, p. 131.

¹¹⁶ Erikson, *Vital Involvement*, p. 160.

¹¹⁷ Erikson, *Vital Involvement*, p.165. This process was also experienced by women when they were widowed.

¹¹⁸ A key component of this was the state of mind, i.e. the individual perceptions of themselves as retired. J. Banks and S. Smith, "Retirement in the UK" (2006).

¹¹⁹ Typically older women's experiences of retirement have been absent from the literature because past cohorts did not participate in the labour market to the same extent as men. See S. Arber and J. Ginn, *Gender and Later Life* (1991).

project. Addressing retirement as a continuation from earlier stages of development, gerontologist Peter Laslett defined this stage of life as the 'Third Age' within a theoretical framework. The 'Third Age' operated as a social benchmark involving the individual relinquishing activities such as income-producing work and reproductive roles in the family, and engaging in the flexible use of time for self-fulfilment and satisfying collective social purposes.¹²⁰ Although status as an older person could be understood as the acquisition of new roles, Laslett's theories stressed continuity between the 'Ages': 'Most individuals retain nearly all their social and political responsibilities as distinct from their work responsibilities...and the personal achievements they strive for over the whole of adult life [accompany] transition to the Third Age'.¹²¹ A cumulative process in the individual life course, the 'Third Age' was based on the concept of flexible potentialities.¹²² Opportunities for character development, civic engagement¹²³, leisure, and consumption¹²⁴ were understood to be determined by the older self. Given the centrality of the individual in this theory, unequal access to resources restrained many older people from full participation in these processes.¹²⁵ However, differential experiences provide scope for further interpretation of Third Age theory: retirement cannot be defined solely by collective homogeneous experiences based on a person's age or a prescribed public role, but rather as an individual social process.

¹²⁰ P. Laslett, *A Fresh Map of Life: the Emergence of the Third Age* (1989), p. 177.

¹²¹ Laslett, *Fresh Map of Life*, pp. 179, 182.

¹²² As opposed to fixed potentialities which can be understood as immutable constraints on human development.

¹²³ Defined as a 'social wage', full social participation within the community in old age has been described as an enhancement of citizenship. E. Midwinter, "Workers Versus Pensioners?", *Social Policy and Administration* **23** (1989), p.210.

¹²⁴ Consumption processes and patterns are bound up with identity, resources, and lifestyle. See Blaikie, *Ageing and Popular Culture*, ch. 3 and K. Mann *Approaching Retirement: Social Divisions, Welfare and Exclusion* (2001), ch. 3.

¹²⁵ This has been viewed as a weakness in the theory. By defining fulfillment in retirement on the basis of the pursuit of middle-class aspirations, the Third Age was not perceived as a reality for all older people. Mann, *Approaching Retirement*, p.93.

The progression of theoretical studies of the social phenomenon of retirement in the post-war decades was largely based on the impact of universal retirement upon the male working class. Generally excluded from a full period of retirement in the past, most older male workers had a qualitatively different experience from older middle-class men and women. In the nineteenth century, the opportunity to retire was limited by an individual's life expectancy and his access to capital, thereby it was an experience more common among the middle classes. However, it would be incorrect to state that retirement was a lifestyle enclave¹²⁶ for the élite. Retirement from employment was recorded in various sources in Scottish industries and census enumerations reports in the period.¹²⁷ For many, retirement was a period to pursue leisure and personal improvement. The popular practice of writing biographies in nineteenth-century Scotland bears this point out. A vast collection of biographical material published in the period provides confirmation that older individuals had time to pursue a variety of personal endeavours in retirement, such as writing biographies. Written by working-class and middle-class men and women in their old age, a selection of reminiscences provides information in respect to what older people chose to do while in retirement. Their range of activities can be organised as follows: intellectual pursuits, civic engagement, leisure, and travel.

Older people's daily lives in retirement were an extension of their experiences over the life course. For many, choice of activities and pursuits operated as a continuation of various interests developed in younger years. These were more common

¹²⁶ A lifestyle enclave is formed by people who share some feature of private life. Members of a lifestyle enclave express their identity through shared patterns of appearance, consumption, and leisure activities, which often serve to differentiate them sharply from those with other lifestyles. R. Bellah, *Habits of the Heart: Individualism and Commitment in American Life* (1985), p. 335.

¹²⁷ William Younger, Private Correspondence (1884-1900) [UGA WY 5/9/1]; William McEwan & Co Ltd, Wages Books (1896-1900/1901-1913) [UGA SNM8/3/2/13-14]; William McEwan & Co Ltd, Private Minutes (1918-1959) [UGA SNM1/6/2/1]; D.Finkelstein, *The House of Blackwood: Author-Publisher Relations in the Victorian Era*, (2002); GRO, *Census of Scotland. 1901 Enumeration, Dundee*.

among those who had enough time in the past to do so, such as middle-class women. Acquisition of new interests and methods of spending time in old age represented a far more particularised experience of retirement, but was similarly based on the individual's status and resources. The adoption of 'retirement' pursuits raises the question as to what processes were involved with the selection of these in later years. Although many of the particular activities such as travel and consumerism have been associated with wealthier classes of society, on the grounds that these pursuits required capital, most older people reported undertaking a wide range of them. The importance of this is that in the twentieth century, these have functioned as a template for most recent models of retirement.¹²⁸ Another important point that was addressed in the narratives reporting the experience of retirement was the almost universal importance of companionate relationships. Time spent with spouses, family members or friends in their various pursuits was cherished. A comparative analysis of the four areas of retirement activities indicates that in the nineteenth and twentieth centuries, for those individuals who lived long enough to experience it, retirement was clearly an important social process in the life course.

In what must be understood as a vital occupation in retirement, intellectual pursuits extended the experience of hard work and discipline into older years. As a bridge from full employment to later old age, a number of men and women specifically undertook significant research and writing projects in retirement. Among these, writing reminiscences in the nineteenth century was an important activity. Constructed for the most part as moralistic narratives reporting a variety of personal experiences as well as contemporary historical events, many of the books provided an indication that the writing process served a function for the author. Time to reflect, acknowledge others' impact on their lives, remain mentally active and commit their past to paper for the

¹²⁸ See Laslett, *Fresh Map of Life* and Mann, *Approaching Retirement*.

future were a few of the reasons provided for undertaking these projects.¹²⁹ Within these works, other intellectual occupations were highlighted as important to the writers in old age. For instance, higher education, reading and mental culture were emphasised. References to the importance of engaging in opportunities for self-improvement throughout the life course were numerous. An interesting example of this was in a former shop-keeper's autobiography. After a relatively solitary life, Mr Adams spent much of his time in retirement engaged in writing and giving public lectures and sermons at church.¹³⁰ It can be observed that such endeavours as improving the mind and filling leisure time with work were clearly influenced by contemporary self-help ideologies.

Driven by principles of social responsibility, civic involvement was also an important feature of retirement. Voluntary service and engagement with interest groups stimulated retired people with the reciprocal exchange of ideas and activities. Participation in social reform movements, local politics, and philanthropy as well as church organisations served to integrate older people into their communities. A review of older citizens' communitarian roles indicates that most of these were gendered: older women tended to spend more of the time in philanthropic pursuits, whereas older men were engaged in politics. One of the few areas of civic engagement which included both men and women was the area of social reform. Contemporary issues such as poor relief, temperance, Chartism, abolitionism, and women's suffrage were important to many older Scots. In old age, mathematician Mary Somerville remained active through her scientific writings and letter-writing campaigns for social reform. In 1869, she corresponded with John Stuart Mill in regard to a petition to Parliament for the extension of the suffrage to

¹²⁹ M Somerville, *Personal Reflections: From Early Life to Old Age, of Mary Somerville* (1873); J. Ireland, *The Life of a Dundee Draper: Containing Various Sketches of Those Connected With the Trade in Dundee* (1878); T. Carlyle, *Reminiscences* (1881); J. McAdam, *Autobiography of John McAdam, 1806-1883* (1980); D. Johnston, *Autobiographical Reminiscences of David Johnston, an Octogenarian Scotchman* (1885); J. Bathgate, *Aunt Janet's Legacy to Her Nieces: Recollections of Humble Life in Yarrow in the Beginning of the Century* (1898); F. Balfour, *Ne Obliviscaris* (1930); Mary G. Clarke, *A Short Life of Ninety Years* (1973).

¹³⁰ A.C. Adams, *The History of a Village Shopkeeper: An Autobiography* (1876), p. 174.

women. She wrote: ‘Age has not abated my zeal for the emancipation of my sex from the unreasonable prejudice too prevalent in Great Britain against a literary and scientific education for women’.¹³¹ A contemporary of Mary Somerville’s, self-taught weaver poet James Gow was noted for his political interests from an early age, and was described as a political agitator in later years. In his middle age, he was committed to Chartism, and in semi-retirement from weaving, he devoted his spare time to the temperance movement in Dundee.¹³² Commitment to the social question was an important motive for many older people’s involvement in the political milieu.

Of equal importance to retired people was the opportunity to enjoy having time for leisurely pursuits in the company of kith and kin or on their own. Although many of these pursuits were often undertaken in younger years, employment and parental responsibilities put time restrictions on these activities. Flexibility in their daily lives provided older women and men with comparable opportunities to experience retirement. An interpretation of the range of activities older people pursued places importance on the individual. This can be explained in terms of social and economic capital, health, and environment. In the first instance, visits to art galleries, museums and the theatre were predominantly middle-class in nature. Peter Carmichael’s frequent excursions between his country home at Arthurstone and Dundee with his daughter to enjoy cultural experiences reflected his socio-economic status.¹³³ A more significant limit, however, was health. Disabilities and illness impacted the older person’s potential range of activities outwith the household. Suffering from intermittent health for a decade, architect Rowan Anderson spent most of his retirement at home with his wife or in their garden, which was a poor substitute for the golf course he loved.¹³⁴ Conversely, many

¹³¹ Somerville, *Personal Reflections*, p. 344.

¹³² W. Norrie (ed.), *Dundee Celebrities of the Nineteenth Century: Being a Series of Biographies of Distinguished or Noted Persons* (1873), pp. 382-389.

¹³³ Carmichael, *Reminiscences*, p. 198.

¹³⁴ S. McKinsty, *Rowand Anderson: “The Premier Architect of Scotland”* (1991), p. 170.

men were reported to be in abundant health in their older years, and were noted for their active lifestyle.¹³⁵ Access to favourite pastimes was enhanced or hindered by where the individual resided in old age. For example, fishing expeditions and hunting parties in the Highlands were less frequently pursued by older men who lived in urban areas.¹³⁶ An outcome of urbanisation was that the range of outdoor leisure pursuits for older people was limited. In the final decades of the nineteenth century, municipal parks and bowling clubs were established in burghal areas throughout Scotland.¹³⁷ Contemporary social trends influenced older people's choices in leisure pursuits; however, their own circumstances ultimately determined the manner in which they spent their free time.

An outstanding feature of contemporary accounts of retirement was how many older people travelled. This was facilitated by innovation in the transportation system and the introduction of formal tour companies. Thomas Cook led his first tour through Scotland in 1846 making use of local steamers and the railway.¹³⁸ The expansion of the railway was a boon to the nineteenth-century Scottish tourist industry. Resort towns boomed, and hydros¹³⁹ were built on a grand scale. Inspired by contemporary literature expounding the beauty of the Highlands, many older Scots travelled by rail and visited the lochs and glens of the West Highlands.¹⁴⁰ Loch Lomond and the Trossachs were

¹³⁵ W. Knight, *Some Nineteenth Century Scotsmen: Being Personal Recollections* (1903).

¹³⁶ C.G. Gardyne, *Records of a Quiet Life, 1831-1912* (1915).

¹³⁷ The Public Health Act of 1875 enabled local authorities to maintain land for recreation and to raise funds for this purpose. Town councils laid bowling greens and Public Parks in this period. In Dundee, parks and golf courses were gifted by the jute barons. Baxter's was the first park in the city and Caird's subsequently included a golf course.

¹³⁸ In 1845, Thomas Cook established his tour company, which provided rail tickets at low prices to thousands of people who had never experienced rail travel before. Such commercial ventures were an immediate success, and provided many older people with opportunities to travel in the late modern period. Cook's initial philanthropic venture launched a movement in Great Britain for budget travel. T. Cook, *A Brief History* (c.2007) <www.thomascook.com>

¹³⁹ In the early 1840s, a new system of water treatment, called hydropathy, which involved baths, showers and sheets, arrived in Britain, and nowhere did it take stronger root than in Scotland. The appeal of its curative regime to middle-class society was enhanced by firm emphasis on temperance, and the hydros became the place for respectable holidays. A.J. Durie, *Water is Best: The Hydros and Health Tourism in Scotland, 1840-1940* (2007).

¹⁴⁰ Walter Scott's novels and 'Kailyard' literature were components of the romantic movement in Scottish literature in the last quarter of the nineteenth century.

favoured by Glaswegians on the basis of their proximity.¹⁴¹ Similarly, day trips to the Sidlaws skirting Dundee and neighbouring seaside resorts such as Monifieth were accessible forms of travel for working-class Dundonians in their retirement. The desire to see Scotland's natural beauty and benefit from fresh air were commonly referred to in the biographies.¹⁴² However, specific journeys were conducted in retirement, which were personally significant to the individual in old age. A number of men and women visited the place of their birth or their childhood home. Usually accompanied by younger family members, this was an opportunity to share their past and achieve a sense of closure. Some of these experiences were very emotional: 'I know nothing sadder than to feel you are a stranger in a scene that was once a family home. As I looked on the surrounding prospect, and thought of all the neighbours I knew so well, all passed away- without a single exception, gone over to the great majority'.¹⁴³ Reminiscences of special holidays and day trips during retirement provided a unique contrast to everyday life in the nineteenth century.

Cultural practices among retired population groups were the product of social aspirations arising from larger disposable incomes in the middle classes; consumerism and leisure time were hallmarks of a moneyed society. Why then did a significant portion of the working-class participate in so many of the same pursuits during their retirement? The root of this question can be resolved in that choices made in old age were an extension of those made throughout the life course. A wider understanding of this question can be explained in terms of class relations in nineteenth-century Scotland. As a

¹⁴¹ Early studies of the draw of the Highlands include: T. Garnett, *Observations on a Tour Through the Highlands and Part of the Western Isles of Scotland* (1800) [UGSC Sp Coll. MU 8 – Y 16] and Anon, *Guide to Glasgow and Favourite Scotch Tours* (1888) [UGSC Sp Coll. BH11-E28].

¹⁴² D.K. Guthrie, and C.J. Guthrie (eds) *Autobiography of Thomas Guthrie D.D. and Memoir by his Sons* (1875); R.A. Watson, and E.S.G. Gilfillan, *Letters and Journals, With Memoir* (1892); Gardyne, *Records of a Quiet Life* (1915); W. Power, *Should Auld Acquaintance...An Autobiography* (1937); R. Carver, *Where Water Comes Together With Other Water* (1984); J.T. du Cros, *Cross Currents: A Childhood in Scotland* (1997).

¹⁴³ Ireland, *Life of a Dundee Draper*, p. 9. Also Bathgate, *Aunt Janet's Legacy to Her Nieces* (1898), p. 160.

response to the emergence of the middle class, artisans and skilled workers modelled their social lives upon a bourgeois defined ideal of respectability. The values associated with respectability were channelled to all members of a literate society through contemporary novels and other forms of popular culture, as well as religion. Working-men's clubs, the temperance movement and friendly societies, advocated self-improvement and thrift, as well as healthy recreation and leisure pursuits, such as cricket and rowing. These values and recreation patterns operated as a common ground between the classes and encouraged the creation of a social alliance between the skilled and the middle classes in Scotland, which was reflected politically in support for popular Liberalism. This is not to say that the Scottish working class had become embourgeoisified, there was also a functional aspect to respectability and the values of self-improvement and thrift which underpinned it. As Knox points out: 'Regardless of origin, leisure pursuits had to be afforded and this necessitated a commitment to the virtues of thrift', on the part of the artisan.¹⁴⁴ The accumulations of resources and consumption patterns over a life time were thus driven by individuals' aspirations and social trends.

Twentieth-century expectations¹⁴⁵ for retirement in Scotland were modelled on potentials from the past and adopted by a growing number of older people over time. Socially-normed perceptions of the retirement process have thus determined social practices in the 'Third Age'. Despite the significance of culture as a source of continuity, it is vital to raise specific aspects of change which have emerged in the post-war period. More so than in any other period, each successive age cohort has experienced retirement distinctively in their location in historical time. This has been the effect of political

¹⁴⁴ Knox, *Industrial Nation*, pp. 97-98.

¹⁴⁵ In a 1956 Scottish study of retirement, Dr Richardson noted that older men's expectations of retirement were often significantly different from their actual experiences. I.M Richardson, "Retirement: a Socio-Medical Study of 244 Men", *Scottish Medical Journal* **1:381** (1956), p. 382.

change, economic trends, advances in health, increased access to assets such as savings, pensions and benefits, as well as the rapid rate in which technological innovations have transformed modern society. These complex forces have influenced both the qualitative and the quantitative features of retirement as a social process. In the interest of interpreting how these historical processes have impacted the quantitative experiences of retirement, demographic data and formal studies undertaken at selected periods of time will be employed. Issues such as longevity and health underpin these interpretations. Subsequent analyses of the qualitative experiences will thus be contextualised in terms of modern trends as well as a source of continuity from the past. By integrating the nineteenth century middle-class model of retirement with twentieth century socio-economic trends, specific practices in the post-war period will be explored.

Viewed over a fifty-year period, much progress has been achieved in improving quality of life and extending the length of time in which older people are retired. At the beginning of the period of study, most working-class men reported when they retired that they were worn out by work. In a formal study compiling English and Scottish data from the 1950s, half of the recently retired men provided ill-health as a reason for early retirement.¹⁴⁶ Few men in that cohort lived beyond pensionable age.¹⁴⁷ Therefore, retirement was short, and more likely to be limited in terms of health considerations. These population trends had a direct impact on older women in the same period. Because their life expectancy was higher, more women were widowed in their 'retirement'. Studies examining retirement patterns among the cohort which retired twenty years later indicated that men and women primarily gave up work due to compulsory retirement policies, and not for reasons of poor health.¹⁴⁸ Furthermore,

¹⁴⁶ D. Cole and J. Utting, *The Economic Circumstances of Old People* (1961), p. 45.

¹⁴⁷ 2.2% of the total male population in Scotland were aged 65 and above in 1951. GRO, *Census of Scotland, 1951*.

¹⁴⁸ Hunt, *Elderly at Home*, p. 62.

proportionately twice as many of that particular age cohort lived to the age of 75 in comparison to the earlier group.¹⁴⁹ Better health for a longer period of time directly impacted quality of life during the retirement years. Retirement was an experience that more men and women were likely to experience, which has had long-term social and economic implications. It must be asked whether the same level of progress in quantitative terms has been achieved in the qualitative experience of retirement in the past fifty years.

Transitions among older populations after retirement policies were enforced in Great Britain from 1946 raises a set of issues concerning collective and individual experiences of these social processes. These will be addressed separately. Assessment of older people's public roles and interactions in the community suggests that for the most part, status as a retired person has evolved. Access to these roles was greatly extended to a larger section of society in old age; working-class men in particular comprised a greater proportion of this identity group. Therefore, older people's social roles and opportunities to pursue various interests in retirement benefitted from historical trends. Some of the most influential of these has been the promotion of social inclusion in recent political agendas. Social movements over the past several decades have specifically incorporated older people's interests in intellectual development into the community at large. One of the most famous of these was the University of the Third Age (U3A) project.¹⁵⁰ From its beginnings, the U3A was a self-help organisation for people no longer in full time employment providing educational, creative and leisure opportunities.¹⁵¹ In the intervening years, the movement had expanded to the extent that there were U3A groups in over twenty Scottish councils in 1999. As a learning co-operative, U3A chapters in

¹⁴⁹ GRO, *Census of Scotland, 1991*.

¹⁵⁰ Based on a French model of higher education for retired people, Peter Laslett and like-minded colleagues introduced the U3A ideal to Britain in 1982.

¹⁵¹ U3A, "History of the University of the Third Age" (2007). <www.u3a.org>

Scotland enabled members to share learning and leisure activities as a means of improving their quality of life.¹⁵² The significance of such networks for older people in the long term can be understood politically: education and social inclusion in the community was empowering. This outcome can be understood as a form of social change. Similarly, increased opportunities for civic involvement functioned as an important communitarian mechanism. Over the years, older people's roles in the voluntary sector and in local politics increased. Interviews with individuals in each sector revealed that this trend has emerged for several reasons.¹⁵³ Because these services were usually provided to the community *gratis*, younger people were not in a position to take on these responsibilities. Moreover, many of these leadership roles demanded skill sets which were more fully developed among senior citizens: the ability to network, accumulated knowledge about the community, and *gravitas* were a few examples of why retired people played an increasingly important part in public duties. Integration in the community thus provided retired men and women with a broader social sphere of activity than in the past.

Opportunities for personal development and the pursuit of leisure in retirement are best understood in terms of the individual. Further to this, such analyses must rest on a gendered interpretation. The 'invention' of retirement included more men in these social processes. This has raised some issues among working-class men. Generally speaking, the lack of role models in the post-war period provided them with unclear expectations of what retirement potentials they could aspire to. 'My parents died by the time they were fifty... I don't know what sort of life they would have had if they had

¹⁵² Edinburgh U3A, "Home Page" (2007). <www.edinburghu3a.org> An important feature of the U3A is its accessibility. In 2007, the annual membership fee for the U3A in most Scottish regions was £15. U3A students came from all social backgrounds, and formed one of the largest social networks for older people in Scotland.

¹⁵³ *Interview with Local Authorities*, Newburgh (7 July 2007); *Interview with Irene Brown*, Dundee (24 May 2004).

lived long enough to retire'.¹⁵⁴ Norms and practices observed in poorer sections of society were carried forward into older years. One man spoke about this at some length. His own experiences of the drinking culture underlined his observation that many men just did not know what else to do until it was too late.¹⁵⁵ A lack of familiarity with some aspects of these processes were however addressed by other groups of men from the same social class as a positive challenge. 'My wife and I both worked, and set aside a bit so we could visit our son in New York once a year. We both knew that we would retire someday. That's a change, but if you know it's coming, you do something about it'.¹⁵⁶ More representative of men's experiences in the past fifteen years, development of social roles and engagement in specific interests were often bound up with their marriage partner. An important consideration that arose was that married men had an easier time with these transitions, as they had their wives with whom they could share their own adjustments.

It can be argued that because older women have historically had more experiences with the social process of retirement as wives or widows, that the post-war period did not dramatically alter their experiences. Arguments to this effect have arisen from a careful undertaking of reviewing original transcripts from the oral history project conducted in 2004. Many of the observations expressed in the collection incorporated recollections from the past few decades in this regard. For the majority of women, retirement was a gradual readjustment. Most of these were in terms of their social roles. While many continued work in part-time occupations or undertook caring responsibilities in addition to various domestic chores, they also experienced 'retirement'. They made more visits to the cinema, enjoyed shopping, pursued various hobbies and activities outside the home, cherished more time for companionship with their husbands,

¹⁵⁴ *Interview with John Rice*, Dundee (20 July 2004).

¹⁵⁵ *Interview with Ron*, Dundee (15 July 2004).

¹⁵⁶ *Interview with Bob Barks*, Dundee (10 May 2004).

cared for grandchildren, enjoyed friendships, and went on holidays and weekend excursions with relatives.¹⁵⁷ Adapting to a new routine often allowed them more time for their own needs. Looking after their health and remaining fit were examples of personal adjustments. Women's experiences of retirement were thus an incorporation of making adjustments for their families as well as themselves. Irrespective of their social or financial resources, the general impression was that older women felt contentment in this new status. This was articulated in oral histories of the recent past, and in written sources a generation ago:

I've never had a garden fair/I've never owned a car/Never had the cash to spare/To visit lands afar...My garden is the countryside/Where I can travel far/My sturdy legs can quickly stride/Where you couldn't take a car...I've well-loved books I treasure/In my quiet home/I've friends who bring me pleasure/When a visiting they come/So within my humble dwelling/There is comfort, peace, and rest/And a love beyond all telling/Warms the heart within my breast...¹⁵⁸

In the extract above, poet Mary Brooksbank's seeming acceptance of economic inequality in old age should not be inferred. Rather, she expressed the point that this stage of life for a woman was the cumulative affect of the social investments she has made over a lifetime.

It has been suggested that there have been parallel experiences of retirement on the basis of economic status in modern Britain.¹⁵⁹ Although there were clear divisions in terms of an older individual's ability to consume, and limits to their potentials in retirement, there were far more similarities between social classes than not. Retired people's lives intersected in fundamental ways. Faced with many of the same set of

¹⁵⁷ The collection of answers in this passage originates from a review of all the original transcripts from the 2004 oral history project conducted in Dundee and Edinburgh.

¹⁵⁸ M. Brooksbank, "Content" in unpublished Notebook (c. 1935-1955). [UDA, Kinnear Collection, MS103/3/8]

¹⁵⁹ P. Johnson, "Parallel Histories of Retirement in Modern Britain", in P. Johnson, and P. Thane, (eds). *Old Age From Antiquity to Post Modernity* (1998).

questions, men and women have had to ask themselves how they felt about retiring, what it meant to be retired, and what they were going to do once retired. The range of activities older people elected to occupy their time with generally fell within a specific range of personal and collective pursuits. These remained fairly constant over the past one hundred and fifty years. Indeed, a vital area of commonality was an emphasis on the significance of family time in older years. A shared identity and status in the community also functioned as common ground between social classes as well as men and women. Specific differences between men and women which have emerged in the twentieth century are similarly less significant than what is shared as a social experience. However, the underlying principle of economic inequality as the basis for these 'parallel retirements' cannot be dismissed. The processes which have perpetuated unequal access to resources in retirement must be further explored in terms of social reproduction and the formalisation of retirement pensions in the twentieth century.

CHAPTER FOUR

THE WELFARE STATE AND THE VOLUNTARY SECTOR: MIXED ECONOMIES OF CARE *C. 1845-1999*

**THE KIRK AND STATE IN THE NINETEENTH CENTURY:
A SCOTTISH MODEL OF SOCIAL POLICY FOR THE AGED POOR
(4:1)**

The social problem of growing older and outliving the means to remain financially independent in nineteenth-century Scotland was influenced by contemporary attitudes regarding pauperism and social responsibility. Strongly held values, such as self-reliance, dominated the philosophy of leading religious men and politicians. Most outstanding among the advocates of the voluntary principle and self-help was the Reverend Dr. Thomas Chalmers. His perceptions and practices regarding the aged poor and pauperism were tremendously influential during the period and since. An examination of church works, government papers, and historical texts published throughout the nineteenth century and well into the twentieth century reveal Chalmers' continuing influence. Parish policies and legislative decisions reflected Chalmers' dominant views. The New Poor Law of 1845 (Scotland) reinforced the tendency to place responsibility for the poor onto the poor and their families. Consequently, the New Poor Law proved to be ineffective at ameliorating poverty amongst some of the most vulnerable in society, the aged and infirm. Similarly, the civilising mission embraced by Evangelicalism failed to meet the more fundamental needs of the aged poor. As the problems of poverty associated with industry and urbanisation increased in magnitude, both the church and the state grappled with reform. From 1880, civic duty became a social trend, placing the problems of the day onto the community as a whole. Church, political leaders and social reformers alike influenced, and often manipulated, public perceptions of the plight of the aged poor in order to address wider issues of poverty. As such, poorhouse accommodation and the need for old age pensions were beginning to be addressed as pressing social problems in Parliament. However, long-maintained beliefs in thrift and personal responsibility dominated arguments for and

against a state pension. The thirty years' debate in Westminster for the Old Age Pension (1908) revealed the continuing influence of Chalmers' social agenda.

In a pre-industrial economy, and to a certain extent in an industrial society, Christian paternalism was the mode of societal control and social welfare in Scotland.¹ Thomas Chalmers' works hearkened to that structure, looking to the parish as the *pater familias*.² He wanted each parish to have its own decision-making administrative processes, unfettered by government interference. As it was until 1845, every church parish in Scotland maintained control of the administration and dispensing of poor relief under the Old Poor Law. Relief for the poor was raised not by mandatory assessment, but on a voluntary subscription basis, as an extension of paternalism. Chalmers' *laissez-faire* philosophy, however, was far from paternal in practice. He tapped into Calvinist notions of pre-determinism with his own arguments about the poor as a separate class. Chalmers captured a bourgeois audience with his argument that: 'The poor are most benefited by being left to themselves'.³ The emerging middle class was thus provided *carte blanche* to amass its own fortunes and separate itself from the population who made such wealth possible. The effects of Chalmers' philosophy of self-reliance were significant. In an 1842 publication containing recollections of life in Edinburgh's Canongate, an anonymous author bitterly observed that: 'So strongly has the opinion of injurious effects of relieving poverty, and of the importance of teaching the poor to depend on their own resources, taken hold of the mind of Edinburgh'.⁴

However, Chalmers was not completely unopposed. One of his strongest opponents was Dr W.P. Alison, professor of medicine at the University of Edinburgh. His views concerning the experiences of the poor and the role of the state contradicted

¹ As late as 1895, Malcolm Mc Neill bore evidence that "the system in this country is a much more paternal system of dealing with pauperism". BPP, *Royal Commission on the Aged Poor* (1895) Questions 9,703-7.

² See R.A. Cage's explanation of the break down of paternalism, and the adoption of more regulated systems. R.A. Cage, *The Scottish Poor Law 1745-1845* (1981), p. 153.

³ Anon, *The Poor of Edinburgh; or Recollections of the Canongate in 1842* (1842), p. 15.

⁴ Anon, *The Poor of Edinburgh*, p. 14.

the popular view espoused by Chalmers. Alison's 1842 report on the sanitary condition of Edinburgh was one of the main influences that prompted the 1844 Poor Law Commission.⁵ In relative terms, although he successfully demonstrated the links between poverty and disease, Alison's sphere of influence was arguably a less pervasive one than that of Chalmers, since it was restricted in time and place. Chalmers' emphasis on social responsibility and self-help continued to dominate debate on poor relief.

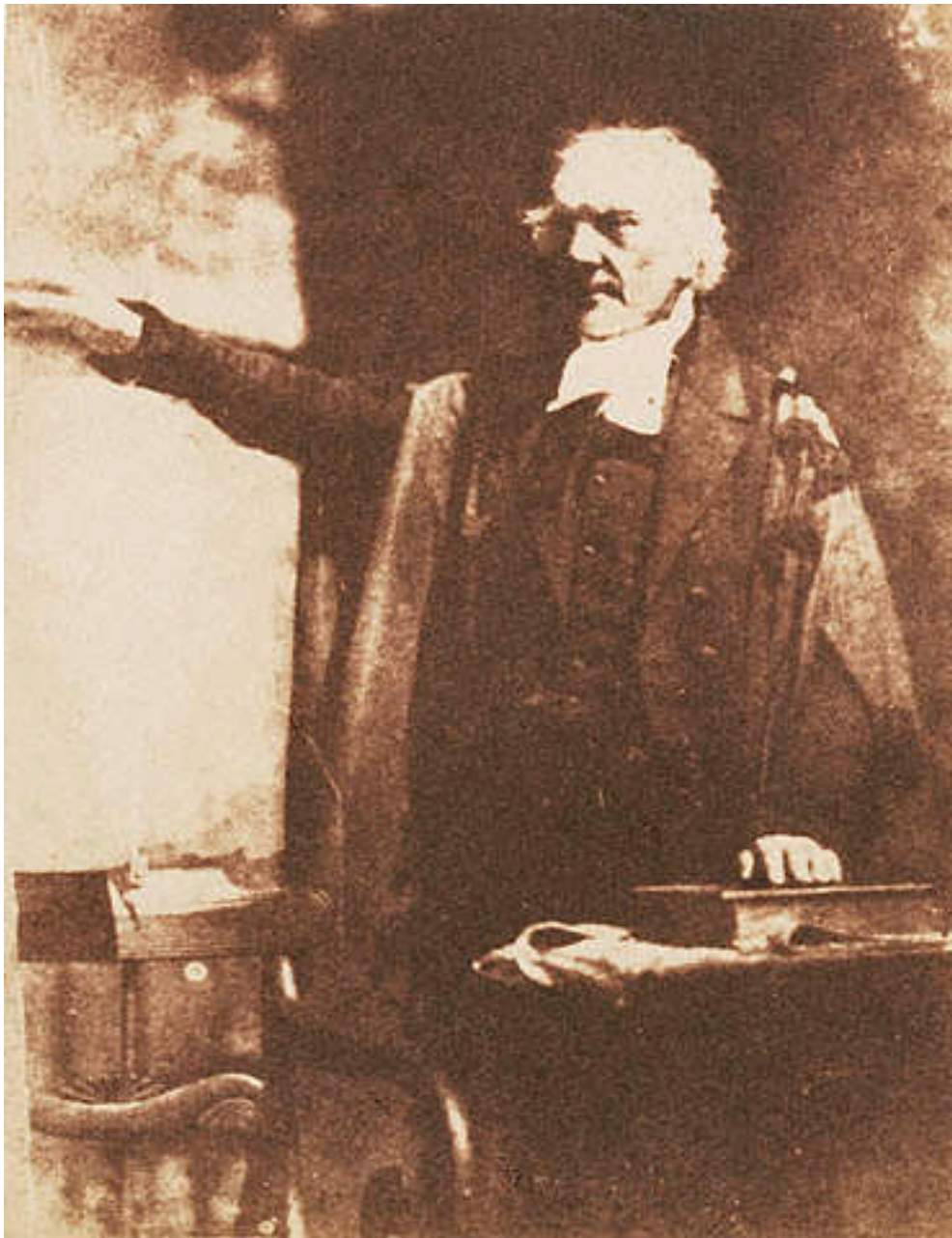
The social problem of pauperism attracted varying degrees of attention and concern. Dr Chalmers sought to eradicate pauperism, which he viewed with antipathy. His application of the terms 'pauper' and 'pauperism' ranged from economic to sociological understandings of the problem. Firstly, he used the term pauper as that meaning the group of people who required relief to merely maintain the same level of existence as those in poverty. The latter, from his definition, subsisted on payment from work rather than charity. Secondly, he defined paupers as a particular group, identified by age as well as class. 'Generally speaking, in Scotland pauperism implies considerable age- so that a generation of pauperism passes rapidly away'.⁶ This definition provided a clear view of Chalmers' grave dismissal of the aged poor. Furthermore, the magnitude of the social problem was made apparent by his assertion that the only remedy for pauperism, and hence old age, was death. Contrary to Chalmers' ageist view of paupers, the social problems of pauperism did not fade out in a generation. In 1874, James Johnstone, minister of the Free Church of Glasgow, asked: 'Are the churches in Scotland capable of dealing with pauperism...?'⁷ Thus, the association of the problems of the aged with the problems of pauperism indicated a social problem far greater than the church was equipped (or willing) to resolve.

⁵ S.M. Martin, 'William Pultney Alison: activist philanthropist and pioneer of social medicine (Unpublished PhD, University of St Andrews, 1995), pp. 282-324

⁶ T. Chalmers, *Christian and Civic Economy*, vol. 2 (1823), p. 144.

⁷ J. Johnstone, *The Ecclesiastical and Religious Statistics of Scotland* (1874), referred to in D.J. Withrington, "The Churches in Scotland, c.1870-c.1900: Towards a New Social Conscience" (1977).

Illustration G: *Thomas Chalmers in Old Age* (1843)



Courtesy of <www.getty.edu> [19 August 2002]

Church and state maintained stringent views regarding poor relief and pensions for the aged poor well into the twentieth century, which reveals the longevity of nineteenth-century ideologies. The dogmatic and pecuniary treatment of the poor became a prototype for policy makers. In 1842, one view regarding government's trepidation concerning change to the poor laws was '...The fear of weakening the prudence and foresight of the poor by teaching them to rely on legal relief'.⁸ Arguments against a New Poor Law expressed in the 1840s were recycled fifty years later as arguments against the Old Age Pension. Regardless of the perpetuity of such arguments, the problems of the aged poor and the New Poor Law needed to be addressed. The governance of poor relief at the parochial level was inconsistent, providing the poor and aged poor with either outdoor weekly payments or indoor relief in the poor house. The parochial boards determined each case on an individual basis, which emphasised the issue of unequal treatment. Receipt of poor relief was a social stigma for the aged, resulting in a loss of civil rights, such as the right to vote if enfranchised. Furthermore, the repellent nature of indoor relief effectively kept a considerable number of the aged off the poor roll. Poor Law and Aged Poor Commissioners, as well as other members of the public, made the observation that many aged couples struggled on to the end, often enduring great suffering, to avoid accepting relief.⁹ Mounting criticism at the turn of the century revealed the inadequacies of Poor Law relief (see below). Dire images of aged people, albeit stereotypical images, were potent arguments against parsimonious scales of relief. Not surprisingly, the church's position regarding parochial relief and the aged poor was vulnerable to current social trends. Both the church and state had to divorce themselves from early Victorian policy concerning pauperism and old age in order to

⁸ Anon, *The Poor of Edinburgh*, p. 15.

⁹ BPP, *Departmental Committee and Other Reports on Old Age Pensions and the Deserving Poor* (1898-1900) p. iv; R.P. Lamond, *The Scottish Poor Laws: Their History, Policy, and Operation* (1892), p. 267; F. Anderson, "Geriatrics", in G. McLachlan, (ed.) *Improving the Commonweal: Aspects of Scottish Health Services 1900-1984* (1985), p.370.

calm the mounting storm of social criticism and politically to address the growth of the labour movement.

The Scottish Presbyterian Church (the Kirk) underwent tremendous transformation during the nineteenth century. The Kirk enjoyed autonomous authority and social control until the Disruption of 1843. Social policy centred upon parish organisations, which varied considerably in terms of funding, conventions, and perceptions. Notions of self-help and family responsibility flowered across Scotland. The social and economic needs of the poor and the aged poor were almost exclusively maintained within their own classes. Segregated economically and socially, the poorer classes were further alienated within the church itself. Although the church's hegemonic grip loosened after the 1843 Disruption,¹⁰ the perceptions and policies concerning the aged poor remained. The passage of the New Poor Law of 1845 guaranteed a continuity of parish control over the dispensing of relief, albeit a control to be shared between poor law administrators and rival churches. An important development was the rise of Evangelicalism, which can be loosely define as a middle-class fervour for religious work, home missions, voluntarism, and temperance that defined the ethos of the period. Simply put, social problems were to be solved by means of civilising missions. Evangelicalism was a condescension which perpetuated the problems associated with pauperism and poverty. Distinctions concerning the poor themselves, namely the 'deserving' and 'undeserving' poor, were reinforced. The Poor Law authorities and the church viewed those whom they believed were intemperate or otherwise incapable of being responsible for themselves in old age were undeserving.¹¹

¹⁰ The 1843 Disruption involved a schism of the Scottish Church. The effect was tremendous as regards funding for the poor. The Free Church and other breakaway churches devoted a significant portion of their monies, including the poor fund, to the building of new churches. Interestingly, Thomas Chalmers was the leader of those churchmen who left the established Church of Scotland.

¹¹ Furthermore, Friendly Societies would not condone intemperance in any form. Article 15 of the 1801 Annan Trades Society Rules and Regulations stipulated: If any member drawing the allowance be proven

Such distinctions effectively marginalised those already most at risk, the aged poor. The churches had to gradually acknowledge that evangelical solutions failed to remedy social problems. A. Scott Matheson, theologian, wrote in 1893 concerning the social needs of his day as an admonition to the church: “There is an urgent need for bringing the resources of this Gospel to bear on the great problems agitating our time with reference to the regeneration of our society... and the social improvement of the people”.¹² Such involvement in social problems suggests a perfect niche for a modern church in modern times.

The working classes experienced alienation from the church, resulting from fifty years of social neglect. Clergymen worried about diminishing numbers asked themselves some painful questions concerning the social role of the church. Church historian D.J. Withrington stated that churches had lost parishioners because of their remoteness from real life. He concluded that the church was irrelevant because it hesitated to campaign on behalf of the labouring poor.¹³ While Scottish churches catered to the middle class, with the exception of the Roman Catholic Church, social problems intensified. A. Scott Matheson bemoaned that:

It is not necessary to exaggerate the gulf between the Church and the working classes; they have got to think that the Church is on the side of the strong against the weak, of the rich against the poor; and they resent being put off with promises of justice and happiness in another world.¹⁴

The problems of the “gulf” Matheson refers to indicated the greater problem of social marginalisation. Furthermore, messages of justice, as Matheson termed it, would likely have disillusioned the aged poor in particular. Notions of the hereafter were cruel

to have been drinking, his paid weekly allowance would be withdrawn. Trades Society at Annan, *Rules and Regulations to be Observed by the Society at Annan* (1801), p. 10.

¹² A. S. Matheson, *The Church and Social Problems* (1893), p. 7.

¹³ D.J. Withrington, “The Churches in Scotland, c.1870-c.1900: Towards a New Social Conscience”, in *Records of the Scottish Church History Society*, Vol. 19 (1977), p. 166.

¹⁴ Matheson, *Social Problems*, p. 13.

reminders of the short yet painful time one has in a present made wretched by poverty. Belief in the efficacy of good works in Presbyterian theology ultimately replaced those drawn from belief in pre-destination. Religion had to become practical if it was to reclaim the 'godless poor'. At the turn of the century, dedicated churchmen fought to maintain the church's place at the centre of the community. In 1901, the Reverend David Watson founded the Christian Social Union (CSU) to investigate and study social problems and to take action in furthering specific reform. The CSU made many failed attempts to establish homes for the aged until 1926, with the successful opening of the Powfoulis Home for Aged Persons.¹⁵

One must examine the origins of the church's newly found social conscience. It is significant that the church platform changed its tune in the later 1880s when Socialism proved to be an alternative solution to society's social ills. Another churchman, J.M. Lang, freely admitted that the church was 'largely indebted to the diffusion of views with a socialistic tendency, to the influence of a social interest that has laid hold of minds which ordinary church methods have not attracted'.¹⁶ Socialist thought was thus not anathema to the church, but complementary to New Testament doctrine. The 'social question' and social reform became central to Christian dogma. At the time, one of the most powerful images of poverty utilised in reformers' testimony and writings were the aged poor as a social group. Matheson sentimentally waxed lyrical in a church lecture about the sorry state of poorhouses separating married couples, tearing asunder what God hath joined together.¹⁷ Respectively, Lang specifically addressed the problems of the aged. He encouraged the movement towards the state pension, quite aware that the church could not meet the needs of the aged poor.¹⁸ Indeed, a system reliant on family duty, charity, and inadequate poor law relief could not keep pace with violent

¹⁵ O. Checkland, *Philanthropy of Victorian Scotland: Social Welfare and the Voluntary Principle* (1980), pp. 59-60.

¹⁶ J.M. Lang, *The Church and its Social Mission* (1902), p. 318.

¹⁷ Matheson, *Social Problems*, p. 176.

¹⁸ Lang, *Social Mission*, p. 160.

economic trends.¹⁹ A state pension seemed a likely socialised solution to the poverty faced by old people. In theory, this would allow the church to doubly benefit by supporting the campaign for a state pension. Firstly, parishioners would have understood that the church was dedicated to solving the social problems of the aged poor; and, secondly, by placing responsibility onto the state, the church appeared to relinquish its pivotal role in society as the financial and administrative source of poor relief. The latter would benefit the church by freeing it from fiscal responsibility. This stance contradicted tremendously with the responsibilities and control enjoyed by the church under the New Poor Law of 1845.

Social and economic problems, which resulted from industrialisation and mass urban migration, could not however be resolved by the church alone. Earlier in the nineteenth century, arguments concerning the abject state of the poor, such as those of Dr Alison of Edinburgh, had prompted the Poor Law Commission of 1844. The Commission's subsequent report formed the basis of the New Poor Law of 1845 (Scotland). Four aspects of the New Poor Law principally affected the aged poor. Firstly, the parish was responsible for providing financial relief.²⁰ Outdoor relief payments ranged from as low as 1s. to 3s. per week, reflecting various determinants such as family resources, funds accessible to the parish, and moral judgments concerning the applicant. In practice, relief for the aged poor was stringent and inconsistent. Secondly, legal provision for the care of the elderly remained bound up with that of the poor. The wording in R.A. Cage's study of the Poor Law reinforces perceptions of the aged poor thus: "The impotent, old, infirm, and orphaned continued to be regarded as proper

¹⁹ Reflecting economic changes due to radical shifts in employment in the third and fourth quarters of the nineteenth century, urban Scotland experienced unprecedented social problems. The cyclical economic downturns were arguably worse for those who could not work regularly, particularly in the case of older men.

²⁰ Under the New Poor Law of 1845, the parish would remain the source of relief. The only significant changes from the Old Poor Law made manifest were the administrative Board of Supervision, and the power for each parish to raise poor funds from within by means of legal assessment. Until 1845, such funds were raised through voluntary subscriptions and donations. See

objects of charity".²¹ (Author's italics) From this one can reasonably argue that ageing was perceived as an infirmity or illness. Thirdly, health care provision for the poor and aged poor was clearly delineated. Dr Anderson, MD, explained that, "Poor Law maintenance was based upon the domiciliary system whereby the poor received relief in their own homes".²² However, the domiciliary system of health care was not *guaranteed* for the aged poor. Their provision was as likely to involve indoor relief. Lastly, poorhouses were established in large towns for the aged whose family or friends were unable to care for them. In time, poor law administrators realised that the problems of poverty in old age were too severe to place major emphasis for relief on relatives (who were likely poor as well), neighbours, and voluntary sources of finance. It was evident that social and political reform was necessary to ameliorate the problem of *laissez faire* policy.²³ In the last quarter of the nineteenth century, an ethos of social apathy was replaced by social responsibility.

Illustration H: *Life in One Room, Dundee* (c.1900)

²¹ Cage, *Scottish Poor Law*, p. 141.

²² Anderson, "Geriatrics", in McLachlan (ed), *Improving the Commonwealth* (1985), p. 369.

²³ D.E.Gladstone, "The New Poor Law Scotland: the Administrative Reorganisation of the First Quinquennium", *Social Policy and Administration* vol. 9, no. 2, June 1975.



[Source: <www.scran.ac.uk> (Accessed 1 July 2005)]

The abject poverty experienced by older people such as those featured in this photograph exemplified the problem of the lack of a universal pension in old age.

Disagreements within Parliament and between Scottish and English political groups as to how to address contemporary social problems were indicative of economic and political marginalisation experienced by various sections of society. For a period of thirty years, the specific problem of poverty in older population groups was carefully investigated in Westminster, with the view of establishing a British policy for the aged poor. The social cause of the old age pension was espoused by individuals such as Charles Booth, Sydney and Beatrice Webb, as well as groups like the Christian Socialists. Their writings, as well as other written accounts from the period, reflect a sense of urgency concerning the need for a universal old age pension: 'Of all the adult classes seeking relief, there is none whose condition appeals more strongly to public sympathy and whose treatment requires more discrimination and greater variety [than the elderly]'.²⁴ However, the prospect of a national social policy challenged Scottish autonomy.²⁵ A review of the political debates conducted throughout the period indicated an anathema among the Scottish Poor Law authorities for a *British* Old Age Pension. In 1895, the Royal Commission on the Aged Poor gathered evidence from Malcolm McNeill, an officer on the Board of Supervision and the only witness from Scotland. His testimony reflected a typically Scottish parsimonious perspective of the aged poor and poor relief. He defended a parochial system of relief saying that:

I think that the Scotch system of management by the parish must have the best effect upon the treatment of the poor, for everybody in the parish must know the circumstances of the aged pauper. Many people have probably known him since he was a boy.²⁶

²⁴ BPP, *Royal Commission on the Poor Laws and Relief to Distress. Report on Scotland* (1909) p. 70

²⁵ Hitherto, acts of Parliament post 1707 were typically passed in tandem, such that legislation was passed in the first instance for England and Wales, providing Scotland with separate acts, thus allowing for different regional and political imperatives. For instance, the New Poor Law, 1845 (Scotland) came to pass twelve years after the New Poor Law (1834) in England and Wales.

²⁶ BPP, *Royal Commission on the Aged Poor* (1895), Question 9,573.

McNeill argued that the institution of a contributory pension fund did not commend itself. For unknown reasons, the 1898-1900 Commissions on Old Age Pensions and the Deserving Poor did not include a Scottish witness. The absence of Scottish testimony proved how entrenched Victorian social philosophy was within the Scottish Poor Law authorities as they declined even to recognise the Commissions. However, attendance was in some way irrelevant since one of the arguments running through the general report of the Commissioners strongly resembled the ideology of Malcolm McNeill, or for that matter, the late Reverend Thomas Chalmers. The Commissioners hesitated to recommend interference with 'the remarkable development of habits and thrift and providence among the working classes in recent times by the exercise of prudence and self-denial, securing for themselves an independent position in old age'.²⁷ Fundamentally, these Commissions produced fairly conservative reports. The Commissioners believed that if relief was opened up to too many people it would have the effect of increasing pauperism. They feared that dependence on the rates would be regarded as the proper condition of the respectable poor in old age. There was a collective reluctance to recommend more than the further implementation of Friendly Societies.

Friendly Societies were established early in the nineteenth century as a formalised contributory fund scheme. Evidence from the Friendly Societies Committee provides an explanation of the societies from the government's perspective. The friendly society provided the means of insurance for the support of members and their relatives. Significantly, it was the chief means of support of members in sickness, or other infirmity, in old age, and for the contingencies of widowhood. It was further explained that whether maintained in old age from sick funds or not, their members

²⁷ BPP, *Departmental Committee and Other Reports on Old Age Pensions and the Deserving Poor* (1898-1900), p. iii.

very seldom applied for Poor Law relief.²⁸ What the Commission described was effectively an insurance policy as opposed to a pension. P.H.J.H Gosden's examination of the historical role of Friendly Societies in the nineteenth century suggests further limitations. 'Friendly Society benefits were never intended to do more than secure contributors against loss of earnings caused by sickness during normal life'.²⁹ Judging by Gosden's analysis, it would indeed be incorrect to classify Friendly Societies as pension schemes. Friendly Societies thus operated more like savings' schemes. Consequently, the contributory nature of the Societies proved to be exclusive. Because Friendly Societies functioned through members' regular contributions, membership would have been denied to those needing a pension the most: the poorer working classes and labourers employed in seasonal work. Government support of the Societies suggests a pecuniary resolve to limit expenditure on the aged. An 1818 editorial condemning savings' schemes would have been equally pertinent if articulated in 1888. 'Another age will do justice to the profound discoverer of a new system of saving the state, by making every poor wretch who earns a shilling put by one penny, to be lodged in the funds; and to continue this screwing economy for the moderate term of twenty years'.³⁰ Britain clearly needed a non-contributory universal old age pension.

Three schemes for a compulsory old age pension were introduced to Parliament between 1885-1908³¹. Canon Blackley, the father of the movement for modern pension schemes³², supported the first of these. Blackley suggested that the state should compel every citizen between the ages of 18 and 21 to buy pensions through a contributory instalment system. The state's role would be nominal, and relegated to the annuitising

²⁸ BPP, Great Britain Friendly Societies' Select Committee, *Select Committee and Other Reports on Friendly Societies* (1886-1899), Sections 242-243; General Report.

²⁹ P.H.G.H. Gosden, *Self-Help: Voluntary Associations in the Nineteenth Century* (1973) pp. 97-98.

³⁰ G. Noel, "Savings Banks and Other Ministerial Expedients and Delusions", in *The Scotsman*, 28 March 1818, p.3.

³¹ BPP, *Aged Poor*, (1895) P. lxxvi: Section 312; P. lxi: Section 276; R.P. Lamond, *The Scottish Poor Laws: Their History, Policy, and Operation* (1892), pp. 286-88.

³² C. Booth, *Pauperism- A Picture and Endowment of Old Age, an Argument* (1892), p. 60. Charles Booth credits Blackley for his pioneering work for old age pensions.

of funds, at the rate of 4 shillings per week, to old age pensioners through the Post Office. However, Blackley's scheme would have excluded those most needing state support. The second scheme backed by Joseph Chamberlain MP, incorporated government contributions with workers' contributions. The state would assist every citizen who wished to buy a pension. This would be based on a scheme by which a man who saved enough to buy an annuity of 2s6d a week should have the sum doubled by the government. Furthermore, the state would match individuals' initial lump-sum contributions of £10. The problem was that Chamberlain's plan also would have proven to be prohibitive to the very poor, as well as women who did not work regularly or at all. The pension scheme promoted by the social reformer Charles Booth was arguably the most inclusive of the three plans, but to the Treasury's chagrin, the most costly. His parameters were that everyone who had attained the age of 65 should receive a pension of 5 shillings per week, to be financed by the Treasury. Charles Booth conceded that 'the amount of 5s. a week does not pretend to be an adequate provision, but it is the contribution of the State towards it which the bare maintenance of a destitute person actually costs'.³³ Booth's was the only non-contributory scheme introduced in the Aged Poor Commission, and not surprisingly, it was rejected on the grounds of costs, notions of age, and the older argument concerning the 'deserving poor'.

Charles Booth, the leading witness on the urban experience of the aged poor, was opposed from various quarters. A principal source of debate was C.S. Loch, the Scottish secretary of COS. Two of Loch's arguments most reflect persistent Victorian attitudes from the north towards pensions. Firstly, Loch argued against a state pension because:

³³ Booth, *Pauperism*, p. 75.

We may conclude that if a national system were established, there would be created in varying numbers a kind of hybrid pauper. The pauper, before sixty, might receive a pension of outdoor relief. After sixty or sixty-five, he would become a claimant for the national pension. Pauper he would remain under both guises.³⁴

Secondly, he contended that no national pension scheme was necessary to reduce or prevent old age pauperism. He based his argument on his belief that a pension would be pernicious since it would discourage saving and create a dependency culture among the elderly. Charles Booth made a rebuttal of C.S. Loch's argument in his own inquiry into pauperism and old age. Booth strongly argued the particular point of Loch's concerning the "hybrid pauper". He insisted that, "in advocating a complete system of pensions I advocate also the abolition of out-relief".³⁵ Booth's version of a pension system would have been comprehensive enough to meet most of the basic needs of the aged. Indeed, his plan was not merely another form of Poor Law supplemental relief. Arguing Loch's second point, Booth explained that with a pension would be the removal of the stigma usually associated with relief. "It is of the essence of the proposal that the pensions should be paid in an honourable way, so as to be absolutely free from any poverty qualification of stigma whatsoever".³⁶ Booth also believed that the pension should be universal because in only selecting the poor, the state would pauperise, and in selecting the deserving, the state would patronise. To do either as far as he was concerned was a disgrace.

After thirty years of debates, several Aged Poor Commissions, and publications to the effect, both Houses of Parliament passed the Old Age Pension Act in 1908. The Act introduced a pension to all persons at or above the age of seventy. The state would finance the weekly five shilling pension payment. In a number of political analyses of the welfare state, it has been stressed that because the 1908 old age pension was means

³⁴ C.S. Loch, *Old Age Pensions and Pauperism. An Inquiry* (1892), p. 27.

³⁵ Booth, *Pauperism*, p. 59.

³⁶ Booth, *Pauperism*, p. 65.

tested, and targeted at very poor old people, the great majority of pension recipients were older women.³⁷ It is quite apparent that the higher rate of female recipients reflected the larger proportion of the population above the age of seventy being female (see Table 4.1). A case in point can be drawn from the 1901 census figures from Scotland.³⁸ Furthermore, older women were more likely to be poor than older men, reflecting work and domestic patterns, and a general economic dependency of older women upon their spouses and families in most British communities. Old age pensions, first paid in 1909, helped make an independent life for the elderly possible. Although confined to a minority of the aged population, the introduction of the old age pension in 1908 was significant. But regardless of how significant the legislation was at the time, some historians have highlighted the political expediency behind it. Paul Johnson has suggested that the Liberal party capitalised on the evolving ideology of state intervention in an attempt to ease political pressure from organised labour and win working-class votes.³⁹ While modern interpretations of political manipulation have tended to substantiate Johnson's argument, the effect of civic involvement should not be overlooked. Given the voluminous arguments and long dedication of contemporary social reformers, one cannot easily dismiss the perceptions and influence of individuals.

³⁷ J. Macnicol, *The Politics of Retirement in Britain 1878-1948* (1998), p.78; P. Thane, "Old Women in Twentieth Century Britain", in L. Botelho and P. Thane (eds), *Women and Ageing in British Society Since 1500* (2001), p. 210.

³⁸ In 1901, 6,750 female inhabitants of the county of Edinburgh were aged 70 or above, whereas male inhabitants at or above the age of 70 numbered at 3,499, roughly 50% of their female counterparts. Numbers for the whole of Scotland vary marginally.

³⁹ P. Johnson, "Parallel Histories of Retirement in Modern Britain", in P. Johnson and P. Thane (eds), *Old Age From Antiquity to Post-Modernity* (1998), p. 214.

Table 4.1

National and County Data 1901: A Comparison of Age Groups, by Gender

1901	Totals	%	above 50	%	above 60	%	above 70	%
<i>Scotland</i>	4,472,103	100	661,349	100	342,066	100	129,674	100
Male	2,173,755	49	292,962	44	143,675	42	51,133	39
Female	2,298,348	51	368,387	56	198,391	58	78,541	61
<i>Edinburgh</i>	422,347	100	61,633	100	29,940	100	10,249	100
Male	196,613	47	25,620	42	11,572	39	3,499	34
Female	225,734	53	36,013	58	18,368	61	6,750	66
<i>Forfar</i>	238,254	100	38,009	100	19,701	100	7,221	100
Male	104,695	44	14,689	38	7,363	37	2,490	34
Female	133,559	56	23,320	62	12,338	63	4,731	66

[Source: BPP, Census Scotland 1901.]

The effect of a parsimonious philosophy in the nineteenth-century church and state was profound. The works and writings of Reverend Thomas Chalmers played an important role in the perpetuation of mean values. The greater part of the century was monopolised by an emphasis on self-help and thrift in lieu of social justice. Consequently, while the Scottish Church experienced radical political change and fits of Evangelicalism, and the state maintained a *status quo*, the aged poor were left to themselves. The role of the family became essential for elderly mothers and fathers. The social problems associated with ageing, namely, older people's unique experiences of inadequate incomes, poor housing, and poor health, were not prioritised. The New Poor Law of 1845 was an admirable feat of administration, but lacked the kind of social vision the aged in Scotland needed the most. An inconsistent and pecuniary system of relief was not adequate. The plight of the aged poor was addressed by the church and state only when it was expedient to do so. From the 1880s, Socialist activity, an evolving ethos of social accountability, and diminishing numbers in the pews inspired leaders in the church to address civic responsibility. As regards the aged, very little was achieved in Scotland other than *ad hoc* philanthropic pursuits. It is significant that the majority of the agitation by the reform movement on behalf of the aged took place in England. Individuals such as Charles Booth achieved in one generation what would have been unthinkable in Thomas Chalmers' lifetime: a state-funded universal old age pension. This first step towards a welfare state would have huge implications for the development of British social policy as well as for individual old people and their families.

OLDER CITIZENS IN THE BRITISH WELFARE STATE (4.2)

The introduction of the Old Age Pension in 1908 was one of the most important pieces of British social legislation in the twentieth century. An essential element in the building of the Welfare State, the Pension Act sparked two fundamental debates which have dominated the political landscape ever since. Firstly, what are older people's rights as citizens in the British Welfare State? Prone to a discursive pendulum as regards the obligations of the state versus the individual, citizenship has been conditional. As an extension of the social contract, formal statutory benefits and services were established for older citizens in the post-war period. Over time, these arrangements were intermittently withheld or extended. Secondly, what part would Scotland play in the British Welfare State? The development of social welfare policies in Westminster diminished Scotland's 'separate but equal'⁴⁰ parochial-based authority, thereby challenging the post-Union⁴¹ balance of power. Loss of relative autonomy in such matters was a primary concern of Scottish officials in the short term, and in the long term provided a basis for the Scottish question of devolution. Both debates will underpin the critique of the British Welfare State as an institution. Underlying this investigation has been the question, why have inequalities persisted among older age groups throughout the twentieth century in Scotland? The prevalence of poverty in a comparatively large section of society is a reflection of various socio-economic factors over the life course. Westminster's fiscal conservatism, failure to understand Scotland's

⁴⁰ Although this expression is typically associated with segregation laws in the American South, the 'separate but equal' doctrine which mandated different facilities and social services seems apt in discussions concerning British and Scottish legislative practices and social welfare provision in the pre-devolution period.

⁴¹ Under the Act of Union (1707), in which Scottish and English Parliaments were joined to form the Parliament of Great Britain, Scotland's legal system, as well as domestic and social policies, were provided for by means of separate legislation.

economic landscape, sexist attitudes, and lack of foresight all compounded these differentials in post-war statutory welfare policies for the elderly.

The history of the British Welfare State has been written to such an extent that to say it would be redundant to pursue the subject in similar fashion is no exaggeration. Indicative of the problems associated with British welfare policies in the twentieth century, a vast literature has addressed the rise of the Welfare State and the Beveridge Report *ad nauseum*.⁴² Furthermore, numerous interpretations employing Marxist, Political-Economy and Feminist discourse have all critiqued the British Welfare State.⁴³ However, British welfare policies have not been examined from national perspectives, which is surprising given the political ramifications of Scottish devolution and recent questions about the meaning of citizenship in Great Britain⁴⁴. Statutory policies for older people therefore must be evaluated within a political agenda dominated by nationalist aspirations and changing ideas of citizenship. In the light of this the impact of the modern welfare state upon older people in Scotland demands a variety of new approaches.⁴⁵ However, because it is essential to contextualise the foundations of the welfare state historically, the economic conditions in interwar Britain, with special reference to Scotland, shall be addressed. Against this background, the specific problems which arose from the Beveridge report will be analysed. Although many sources have covered much of this in terms of Britain, some specific trouble areas as pertaining to Scotland can be extrapolated from the Report; especially those resulting from the insurance principle, flat-rate benefits, and the exclusion of women. Accounts from oral sources and original studies held by

⁴² Pat Thane among others suggests that 'the story of pensions policy has been told too often to require repetition in detail'. P. Thane, *Old Age in English History* (2000), p. 364.

⁴³ The most prolific of these in Britain have been R.M. Titmuss, Peter Townsend, Chris Phillipson, Alan Walker, John A. Vincent, Sara Arber, Jay Ginn, Lynn Botelho and Dulcie Groves. Ian Levitt and Thomas Ferguson have specifically reported the social conditions in Scotland. Many of the arguments put forth in this section rest on the fine work of these individuals.

⁴⁴ Gordon Brown has introduced this question in more recent times in his role as Prime Minister.

⁴⁵ In his study of the NHS in Scotland, Morrice McCrae made the point that Welfare State institutions such as the NHS must be interpreted in terms of the Scottish experience, which had hitherto been overlooked in other surveys of the NHS which concentrated on England.

Age Concern Scotland and the Scottish Executive further illustrate the specific problems of social and economic exclusion suffered by the elderly. Longitudinal comparisons between Scotland, the rest of the UK, and the EU in the modern period also raise questions about the objective of a 'welfare state'.

Understandings of welfare as a function of the state have progressed in relation to the changing imperatives of government and individuals' needs over time. In 1942, William Beveridge's diagnosis of want was based on demographic forecasts of an ageing society that would become increasingly dependent upon a declining number of younger people: the age constitution of the people determined the purpose of welfare.⁴⁶ An outcome of fiscal conservatism, the philosophy of welfare expressed in the National Assistance Act (1946) was bound up with the ideology of the Poor Law: welfare benefits were adequate⁴⁷, but discriminatory. Contrastingly, welfare can be expressed in terms of the rights of citizenship, an ideal of the modern state. In practice, welfare in this context was conditional, due to distinctions between rights and obligations.⁴⁸ Statutory provisions of welfare were thus considered in terms of transactions between the state and the citizen, imposing responsibilities on both parties to the bargain. Taken together, these economic definitions only partly addressed the function of welfare. As a response to these limitations, welfare has more recently been developed conceptually as the social distribution of well-being that includes everyday life, local interactions and institutional practices.⁴⁹ In this respect, social inclusion is seen as a significant component of welfare.

⁴⁶ W. Beveridge, *Social Insurance and Allied Services* (1942), section 15.

⁴⁷ Welfare provision in Scotland was firmly rooted in terms of the concept of 'adequate', a term used repeatedly by C.S. Loch in COS papers. 'Adequacy' can be equated with the poverty line, or as a buffer between relative and absolute poverty. C.S. Loch, 'Poor Relief in Scotland: Its Statistics and Development, 1791-1891', *Journal of the Royal Statistical Society*, **61:2** (June 1898).

⁴⁸ T.H Marshall's analysis of the relationship between citizenship and welfare provision indicates a transitional period in terms of the meaning of welfare. T. H. Marshall, *Citizenship and Social Class* (1950).

⁴⁹ S. Langer, "Understanding Well-Being in a Globalised World" *European Association of Social Anthropologists Biennial Conference* (2006), Introduction.

The evolution of welfare discourse⁵⁰ thus provides insights into the inconsistencies of British Welfare State policies in the post-war period.

Scotland's relative economic disadvantage as a region in twentieth-century Britain underlies the fundamental question as to whether it has benefitted from the Welfare State to the same extent as the rest of the country. Interpretations of social and political exclusion must therefore be explored in terms of economic infrastructure. From the mid nineteenth century, Scotland experienced greater hardships and was more prone to economic downturns than her English neighbour. This has been attributed to an overreliance on export markets, coupled with narrow concentration on a defined range of industries, and the subsequent collapse of these traditional industries in the twentieth century.⁵¹ After the First World War, the Scottish economy was particularly vulnerable to the entrenched problem of structural imbalance. The terminal decline of Scotland's industries was investigated as a particular area of concern in historian C.L. Mowat's meticulous analysis of the interwar period. Mowat argued that in addition to the structural problems of Scottish industry, steelworks, shipyards, railways, textile mills and banks were at a disadvantage because these industries were increasingly under the control of English companies⁵²; Scotland's interests came last.⁵³ This point can be illustrated by the economic prognosis in 1931: at the worst period of the Slump, total production in Scotland had declined by 12% from pre-war figures, whereas England's had risen by

⁵⁰ Dorothy Wedderburn observed that 'the various meanings of "welfare state" would be worth an essay in themselves and some of the argument about whether the welfare state has or has not made a fundamental change in capitalist society is no more than a semantic disagreement about definitions'. D. Wedderburn, "Facts and Figures of the Welfare State", *The Socialist Register* (1965), p.127.

⁵¹ W.W. Knox, *Industrial Nation* (1999), pp.189-90.

⁵² In the interwar period, many industries began a process of amalgamation, which brought about the concentration of ownership in England. Although many industries ultimately collapsed, amalgamation extended the life course of many industries, such as the Scottish brewing industry. Almost entirely owned by English companies and shareholders, the industry as such is intact. I. Donnachie, *A History of the Brewing Industry in Scotland*. (1979).

⁵³ C.L. Mowat, *Britain Between the Wars, 1918-1940* (1984), pp.468-469. The Pilgrim Trust is the source for much of Mowat's data.

20%.⁵⁴ The social consequences of the widening gap between England and Scotland were far-reaching. Malnutrition, illness, infant and maternal mortality, overcrowding and slum housing remained very much worse north of the border than in England. By the late 1930s, these inequalities had intensified to such an extent that deterioration in living standards for a rising number of the older population highlighted the inadequacies of relief and necessitated further sources of assistance from the state.

Economic depression and mass unemployment in the interwar years thus served as a catalyst for state intervention. Vast numbers of 'able-bodied' unemployed people upset the balance of the Poor Law, in which the able-bodied poor were hitherto disqualified from relief. Westminster cautiously established statutory benefits such as unemployment assistance in the interest of maintaining a *status quo*. Aware that formal provision of welfare would ultimately set a precedent for the future, separate measures to limit other forms of relief were instituted. Specific policies such as the means test were unnecessarily punitive for vulnerable sectors of society. In studies conducted throughout the UK at the time, the problem of the means test for the elderly was emphasised. Between 1931 and 1932, the Trades Union Congress (TUC) examined the degree of hardship experienced by those out of work. They observed that cases of acute hardship were caused by the implementation of the Means Test in 1932, most principally among older people.⁵⁵ Pensioners were reportedly forced to move out of their family home because their earnings or pensions had led to a reduction in the unemployment relief in the household. Alternatively, upon application for the old age pension, older people who lived with family members at this time were granted a reduced pension.⁵⁶ Such measures impacted on poorer families in particular who ordinarily shared accommodation resulting

⁵⁴Mowat, *Britain Between the Wars*, p. 469.

⁵⁵ TUC, "The Thirties" *History of the TUC* <www.tuc.org> [Accessed 10 December 2007] Rowntree's studies of York and contemporary accounts in novels such as those of G. Orwell, *The Road to Wigan Pier* (1937) raised concerns about the circumstances of older people.

⁵⁶ Irish Parliament, *Private Deputies' Business: Old Age Pensions Bill* (March 1930), sec. 1904.

from housing shortages, such as in Dundee.⁵⁷ Irrespective of the severe nature of some of these policies, the introduction of statutory welfare policies for the able-bodied poor opened a political Pandora's box.

Conservative interwar policies determined the manner in which welfare state legislation was implemented in the 1940s. The central question as to how government should approach retirement pensions in particular proved to be problematic in both Westminster and Scotland. Political analyses of welfare reform show the degree of general hesitancy on the part of Whitehall in respect to old age pension legislation.⁵⁸ Compelled to retain economic stability during the economic depression and war years, rationalisation and fiscal conservatism were the hallmarks of the Treasury.⁵⁹ Within this political climate, several pieces of pension legislation were passed between 1919 and 1940⁶⁰, which shifted the pension from non-contributory to contributory status. Driven by the insurance principle, pension laws established a cooperative relationship between the citizen, employers, and the state. Working within this model, William Beveridge and a committee of civil servants made various recommendations for the foundation of the British Welfare State.⁶¹ Although the Beveridge report has come to represent progressive change, the underlying principles suggest that the blueprint for the welfare state were far from radical. Hence, the question concerning the role of government in social welfare policies was resolved by means of accommodation and fiscal conservatism. But questions concerning the role of the state also persisted in Scotland at this time.

⁵⁷ J.M. Jackson found that as recent as the late 1970s, the highest rate of intergenerational housing arrangements in urban Scotland was in Dundee. J.M. Jackson (ed.), *The Third Statistical Account of Scotland: The City of Dundee* (1979).

⁵⁸ J. Macnicol, *The Politics of Retirement in Britain 1878-1948* (1998).

⁵⁹ In his critique of the influence of the Exchequer and civil service, C.L. Mowat quipped that provisions such as a non-contributory pension were 'an affront to the tidy mind of Treasury'. Mowat, *Britain Between the Wars*, p. 471.

⁶⁰ In 1919, 1925, and 1940 respectively, old age and widows' pension laws were passed, each law diminishing the initial radical implications of a universal non-contributory pension in 1908.

⁶¹ W. Beveridge, *Social Insurance and Allied Services: The Beveridge Report in Brief* (1942).

However, at the heart of these debates was not welfare, but the issue of Scotland's national identity and the state of the Scottish economy⁶². During the inter-war period, major dislocations associated with mass unemployment and the decline of Scotland's principal industries predominated political life in Scotland. Under such circumstances, nationalist questions emerged: Was the solution for Scotland's endemic social and economic problems dependent upon centralised British control? Scottish historian R.J. Finlay argued that the Labour Party's orientation toward British political and economic priorities from the late 1920s fuelled debate concerning the crisis of national identity.⁶³ Economic recovery was thus prioritised north of the border. Seldom on the Scottish political map, pensioners' movements tended to rely on the voluntary sector and left-wing politicians in the interwar period. Indeed, only the most radical of Scottish MPS actively promoted the old age pension. Communist MP William Gallacher organised various OAP organisations in Scotland and England in 1937 to further the pensioners' movement.⁶⁴ For the most part, ambivalence and conservative practices characterised the political machinery which produced the British Welfare State.

More problematically, government's subsequent adoption of William Beveridge's modest proposals for social insurance laid the foundation for welfare legislation quite out of step from what many citizens needed from a welfare state. Critiques of the British Welfare State have therefore addressed the problem from three perspectives. Firstly, the Beveridge Report itself has been deconstructed, from which the particulars have been interpreted in terms of a breadth of modern social problems; secondly, welfare state legislation, including the National Insurance Act (1946) has similarly been scrutinised, and at least in part, condemned for not establishing a more redistributive welfare mechanism; and lastly, incoherent pension policies in subsequent decades have been

⁶² R.J. Finlay, "National Identity in Crisis: Politicians, Intellectuals and the 'End of Scotland' 1920-1939", *The Historical Association* (1994).

⁶³ Finlay, "National Identity in Crisis", p. 244.

⁶⁴ W.W. Knox, "William Gallacher", in *Scottish Labour Leaders 1918-1939*, ed. W. W. Knox, (1984), p. 118.

attributed to the inherent problems of the Beveridge report and various governments' disastrous tinkering with pension and welfare legislation.⁶⁵ Analyses of modern debates in combination with further investigation of the original sources provides several insights concerning the specific challenges older populations in Scotland since 1945 have experienced as Old Age Pensioners.

Indicative of the wider issue of British policy failures in addressing particular social problems in Scotland, the National Insurance Act (1946) and its antecedent, the Beveridge Report (1942), failed to make accommodations for Scotland's economic and social infrastructure. Guided by overly optimistic predictions for post-war economic recovery and conservative assumptions concerning family formation and informal provision of care, Beveridge's recommendations were not applicable to a large section of Scottish society. A few of his plans reinforce this point. His admonition concerning the nature of social insurance did not take into account the higher proportion of lower wage-earners in Scotland: 'Benefit in return for contributions, rather than free allowances from the State, is what the people of Britain desire...management of one's income is an essential element of a citizen's freedom'.⁶⁶ Analysis of working-class savings prior to the introduction of pension laws and their financial arrangements after the onset of national insurance repudiates Beveridge's patronising individualist stance.⁶⁷ Saving for old age by

⁶⁵ The incoming 1974 Labour Government argued that, despite reform in 1961, pensioner incomes were still not keeping pace with other earnings and that something had to be done. They made two changes. The first was to make a formal link between the basic state pension and earnings by instituting an automatic annual uprating. The formula used was to increase pensions by a percentage equal to the growth of prices or earnings, whichever was the higher. The second change was to go much further than the old graduated pension by introducing a full scale second tier to the UK state pension system—the State Earnings Related Pension, commonly known as SERPs. A person who was in employment may have paid into SERPS. In 1980, the Thatcher Government removed the formal link between pensions and earnings and linked the basic state pension simply to prices instead. In 1985, Government reduced SERPS benefits and introduced a scheme for contracting out of SERPS to save into a personal pension. SERPs ran from 6 April 1978 to 5 April 2002 when it was reformed by the State Second Pension. The Pension Service (DWP), "SERPS" (c. 2007) <www.thepensionsevice.gov.uk> [Accessed 4 January 2008].

⁶⁶ Beveridge, *Social Insurance and Allied Services*, sec. 21.

⁶⁷ P. Johnson, *Saving and Spending: The Working-Class Economy in Britain 1870-1939* (1985), p. 215.

means of flat-rate contributions to the state was a particular hardship for the Scottish working class.⁶⁸ Reciprocally, subsistence level benefits requiring supplemental provision ‘for ...higher standards [as] primarily the function of the individual...as a matter of free choice’⁶⁹, thus penalised older people who had never earned enough over the life course to save for old age. Furthermore, the National Assistance Act excluded some women from their rights as citizens. ‘A woman over pensionable age shall be entitled to a retirement pension by virtue of the insurance of her husband’.⁷⁰ Because conditions were based upon participation in the labour market, the assumption was that married women would not remain in employment. Such policies failed to provide for large numbers of women who worked sporadically over the life course in Scottish industry and services (for much lower wages than men), as well as a marginally higher proportion of unmarried women in old age. Scotland’s position as a poorer country has generally not been accounted for. Westminster’s application of the Beveridge report in the post-war period has thus engendered significant debate concerning the salience of the welfare state project.

Recent debates querying the long-term political implications of the Beveridge report are historically situated as a source of re-evaluation after four decades of social investigations and studies of poverty in various older population groups across the UK. Pension and welfare policies have thus been interpreted with the central question of whether or not the Beveridge report stifled welfare state legislation throughout the period. Challenging various institutions of the modern welfare state, economist Helen Fawcett has argued that effects generated by the Beveridge model itself were a powerful barrier to long-term change. Financially-restricted foundations denied the welfare state

⁶⁸ Lloyd George’s rationale for the non-contributory pension in 1908 was based on his understanding that the majority of working people were ‘unable to deflect from their weekly earnings a sufficient sum of money to make adequate provisions for old age in addition to that which they are making for sickness, infirmity, and unemployment’. D. L. George, in BPP. *Hansard* (15 June 1908), sec. 4.

⁶⁹ Beveridge, *Social Insurance and Allied Services*, sec. 302.

⁷⁰ BPP. *The Public General Acts*. National Insurance Act, 1946. [GEO. 6] (1946), Pt II, sec. 21.

of resources, and thereby curtailed the flexibility needed to respond to changing circumstances and expectations. Furthermore, the creation of short-term pressures for increases in the basic retirement pension caused, through the very inadequacy of that pension, the growth of a powerful private sector policy. 'Thereby 'lock-in' effects developed, and it has become progressively more difficult to reform the system.⁷¹ Fawcett stressed that while Britain became increasingly intertwined with the insurance industry, European countries such as Sweden and Germany have redesigned their welfare systems to greater effect. Countering the financial straight-jacket argument, historian Paul Bridgen argued that the Beveridge report left much that was important with respect to the distributive conditions of reform to be finalised in the passage from the Report to legislation. Moreover, even after the 1946 Act was passed, some of the flexibility inherent in Beveridge's proposals survived. Particular attention to the decisions made by politicians and state officials in the 1950s show how contested elements of the post-war settlement remained. Subsequent ideological differences between political parties promoted debate about basic principles, such as how redistributive state provision should be. Bridgen concluded his side of the debate thus: 'The Beveridge report did not represent the endpoint of an argument...Rather it is best seen as one event, albeit an important one, in an ongoing argument about the best method for financing pensions'.⁷² Points drawn from both arguments suggest that some of the most problematic aspects of Beveridge's proposals have remained intact, and areas in which flexibility was employed has resulted in a pension policy which lacks cohesion. This assessment of the limitations of the welfare state can be elaborated upon with qualitative and quantitative analyses of the problems older women and the poorer working classes have experienced in Scotland in the past several decades.

⁷¹ H. Fawcett, "The Beveridge Strait-Jacket: Policy Formation and the Problem of Poverty in Old Age", *Contemporary British History* **10** (1996).

⁷² P. Bridgen, "A Straitjacket with Wriggle Room: The Beveridge Report, the Treasury and the Exchequer's Pension Liability, 1942–59", *Twentieth Century British History* (2006).

The social problem of poverty among older population groups in Scotland as well as the rest of Britain has been examined in terms of the unequal provision of welfare. While most of the early discourse concentrated on material disadvantage, current literature addresses the experience of economic and social exclusion. A common thread in the literature is the question: do older citizens have the same rights to welfare? The cumulative experience of inequality over the life course has provided a context for examinations of the everyday lives of poorer older people. Among the most notable of these are Peter Townsend and Brian Abel-Smith's *The Poor and the Poorest* (1965), Peter Townsend, *Poverty in the United Kingdom: a Survey of Household Resources and Standards of Living* (1979), and Gordon Brown and Robin Cook's *Scotland the Real Divide: Poverty and Deprivation in Scotland* (1984). All three texts provide two points to consider in terms of the Scottish experience over time. Firstly, the longitudinal impact of small pensions and inconsistent policies has significantly contributed to poverty in old age in Scotland. Comparisons between England and Scotland as well as between age cohorts within Scotland indicate that the persistence of poverty has been exacerbated by unequal access to welfare benefits and social services.⁷³ Although pensioners formed more than a sixth of the Scottish population by the 1980s, they provided more than a third of those who lived at or below the poverty line.⁷⁴ This percentage was higher than British data (see Table 4.2). One consequence of both absolute and relative poverty has been the exclusion of older people from the mainstream.⁷⁵ Secondly, in spite of economic inequalities, older people's uptake of welfare benefits in Scotland has remained relatively

73 Hadley, Roger and Webb, Adrian. "Loneliness: Social Isolation and Old People- Some Implications for Social Policy" (1974); Age Concern Scotland, "Shortchange: The Effect of the 1988 Welfare Benefits Changes on Elderly People" (1989); A. Goodman; P. Johnson; and S. Webb, "Inequality in the UK" (1997); Scottish Executive. *Social Justice: A Scotland Where Everyone Matters* (2000); Scottish Executive. *Scoping Study of Older People in Rural Scotland* (2003). Unequal access to welfare has been explained in terms of region, rural/urban divides, gender, individuals' past work history and contributions, changes in policies, and social networks.

74 A. Grimes, "Pensioners in Poverty", in G. Brown and R. Cook (eds), *Scotland the Real Divide: Poverty and Deprivation in Scotland* (1984), p. 137.

75 J. McCormick and G. Leicester, *Three Nations: Social Exclusion in Scotland* (1998), p.8.

lower relative to the national average (see Table 4.3). In a follow-up to the 1964 study, Peter Townsend examined poverty in the UK in the 1970s. In his few examples from Scotland, he noted that a high percentage of respondents did not receive national assistance or benefits.⁷⁶ Later studies conducted exclusively in Scotland also noted older people's reluctance to claim state supplementary benefit.⁷⁷ Support in kind or of a financial nature was often obtained from informal sources or the voluntary sector instead.⁷⁸ Limited access to formal resources and welfare benefits in Scotland has ultimately been a far more significant problem for older women.

⁷⁶ P. Townsend, *Poverty in the United Kingdom: a Survey of Household Resources and Standards of Living* (1979).

⁷⁷ A. Grimes, "Pensioners in Poverty", p. 138.

⁷⁸ The role of the voluntary sector will be examined in the final segment of this chapter.

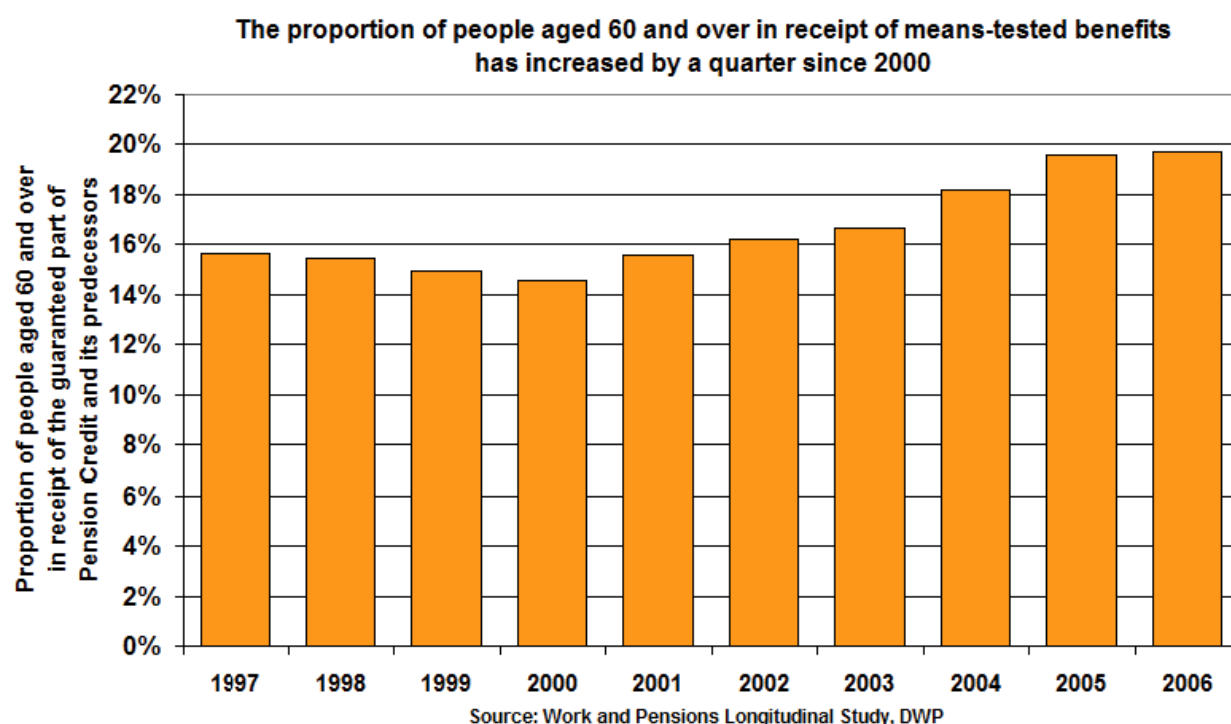
Table 4.2 *Comparison of Percentages of Family Types with Incomes Below Half the Contemporary Mean, Great Britain: 1979 and 1992/3*

(Percentages %)	Before Housing Costs		After Housing Costs	
	1979	1992-1993	1979	1992-1993
Pensioner Couple	16	25	21	26
Single Pensioner	16	25	12	36
Couple with Children	7	20	8	24
Couple	4	10	5	12
Single with Children	16	43	19	58
Single	6	18	7	22
All Family Types	8	20	9	25

[Source: A. Goodman; P. Johnson; and S. Webb, *Inequality in the UK* (1997), p. 247.]

Comparative data between the 1970s and 1990s reveals three important economic patterns. Firstly, British society as a whole experienced diminished spending power, relative to lower incomes over the period. While the most dramatic changes were among single people, pensioners also experienced an absolute drop in income over the period. Secondly, other than single parents with children, pensioners composed a larger proportion of the population earning incomes below the contemporary mean throughout the time period under examination. Lastly, it is clear from this information that poverty is prevalent among women. In the case of this data set, single mothers and single pensioners, who tend to be older women, earned the lowest incomes.

Table 4.3 Recipients of Pension Credit in Scotland, 1997-2006



[Source: Joseph Rowntree Foundation. *Monitoring Poverty and Social Exclusion in Scotland*. (2006), p. 30]

The low uptake of pension credits is evident in this longitudinal study. In 1999, no more than half of Scottish pensioners who would have qualified for these benefits claimed them. A review of data over a sixty-year period indicates that this was the lowest uptake of means-tested benefits among older cohorts. This raises the question as to why so few Scottish pensioners were in receipt of benefits that they were entitled to. Studies of this problem in the past have failed to resolve the influence of various factors such as personal choice, aversion to means testing, lack of information, and differential experiences of 'welfare culture'. The latter phenomenon has emerged in more recent decades, in that some sectors of society remain in the poverty trap over the life course, and are thus recipients of welfare their entire lives.

The consequences of Government's unequal treatment of women in the welfare state are severe. Although this is quite evident in the Scottish context in recent years, there is a dearth of material in the historical literature. In a study conducted in 1998 for the Scottish Office, prominent Scottish feminist historian Esther Breitenbach found a number of limitations. Research on women's issues was generally considered to be limited in scope and depth, many studies were small-scale, coverage of topics was uneven, and in some areas there was virtually no research.⁷⁹ The latter case was true for the social and economic experience of older women in Scotland. Hence analyses in this respect have relied solely upon English sources⁸⁰ through the year 1999, or are almost entirely obtained from the Scottish Executive and the oral history project conducted for this thesis. The latter provides strong examples of the problem of the welfare state for older women in Scotland. In a series of interviews in Dundee with former jute mill employees and a smaller group of women who had cared for their husbands and families for their entire marriage, various themes emerged.⁸¹ The primary problem was that while some of the women paid 'the full stamp'⁸², more women experienced the result of paying a 'reduced rate stamp' of lower contributions, based on lower wages, which amounted to a smaller pension. Some women did not qualify for their own pension because they did not work for enough years on a full-time basis.⁸³ Widows earned only 60% of their

⁷⁹ E. Breitenbach, *Research on Women's Issues in Scotland: an Overview* (1999).

⁸⁰ The specific problem of policy is the basis for discussion in these texts: A.B. Atkinson, *Poverty in Britain and the Reform of Social Security* (1970); C. Phillipson, *Capitalism and the Construction of Old Age* ((1982); C. Phillipson, and A. Walker (eds), *Ageing and Social Policy: A Critical Assessment* (1986); M. Maclean and D. Groves, *Women's Issues in Social Policy* (1991); and A. Walker and C. Walker, *Britain Divided: The Growth of Social Exclusion in the 1980s and 1990s* (1997).

⁸¹ Despite the comparative economic discrepancy between the women on the basis of their background, their present situation as relatively poor older women narrowed the gap in status. I elected to abstain from making inquiries in respect to actual income on the advice of an oral historian, who observed that such questions would hinder any progress in obtaining information from interview subjects.

⁸² The 'full stamp' and 'reduced rate stamp' refer to the choice of contributing at the same rate as an employed man, or at the reduced rate for married women. Women made weekly contributions, which were recorded with a stamp at the Post Office. Government has phased out the reduced rate stamp, so that by 2010 they will be almost entirely phased out. UK Parliament, House of Lords, *Debate on Married Women's Pensions* (15 October 2002).

⁸³ This problem is being addressed by raising the statutory age of retirement for women to 65 and credit for child-rearing/caring responsibilities in more recent years.

husband's pension. The further issue of older women in receipt of a greater proportion of welfare benefits was referred to (see Table 4.4). Perceptions of this varied, in that while some women were not happy about these circumstances, most accepted them. One source provided a positive outlook:

Oh I get along fine Hen. Nothing coming over me. I dinna need anything. I'm very, very independent, very... Getting older's fine but if you get older and you're no able to support yerself, it curtails what you can do.... other than that being looked after I mean to say, there's no problem, there's that many services that you can call on to look after you and things like that that you dinna have to do without, you know, there's help every place. But in Britain you are well looked after, really you are, and the clubs that are going for you are really good, aye...⁸⁴

Satisfaction with welfare provision often rested upon the combination of disability benefits and supplementary benefits as well as old age pensions, thereby providing a better income and more services. Analysis of the economic and social problems many older women in Scotland have faced in the modern period is limited by subjects' remembrances of the past, during which time many women experienced far greater hardships. Therefore, women's experiences as recipients of welfare can be understood as a relative experience between age cohorts, which will remain to be explored at a future time.

⁸⁴ *Interview with Bet Park, Broughty Ferry (4 June 2004).*

Table 4.4.: Recipients of Key Benefits by Gender, Scotland, 2000

Thousands

Recipients by type of benefit	Men (thousands)	Women (thousands)	Women as % Total
All Jobseeker's Allowance Claimants⁸⁵	91	29.8	24.7
All recipients of Income Support	141.6	267.7	65.4
Of which:			
Aged 60 and over ⁸⁶	52.8	119.3	69.3
Disabled ⁸⁷	62	57.7	48.2
Lone parent ⁸⁸	4.7	77.1	94.3
Other	22.1	13.6	38.1
Disability Benefits:			
Severe Disablement Allowance	17.9	25	58.3
Attendance Allowance	36.6	92.1	71.5
Disability Living Allowance	118.8	121.7	50.6
Disabled Person's Tax Credit	1.2	1.1	48.1

Sources:

Scottish Executive, *JSA: Jobseeker's Allowance Quarterly Statistical Enquiry*, August 2000; Scottish Executive, *Income Support: Income Support Statistics Quarterly Enquiry* (5% sample), November 2000; Scottish Executive, *Disability Allowances: Benefit computer system, DSS Information Centre*, 31st August 2000; Scottish Executive, *Disabled persons Tax Credit: Inland Revenue* (WFTC Quarterly Enquiry, July 2000).

N.B.: Numbers are based on a 5% sample and are therefore subject to a degree of sampling error.

⁸⁵ Jobseeker's Allowance figures include claimants receiving Income-Based or Contribution Based Jobseeker's Allowance, and those receiving no benefit but signing for National Insurance Credits Only.

⁸⁶ Pensioners are defined as where the claimant, and /or partner are aged 60 or over.

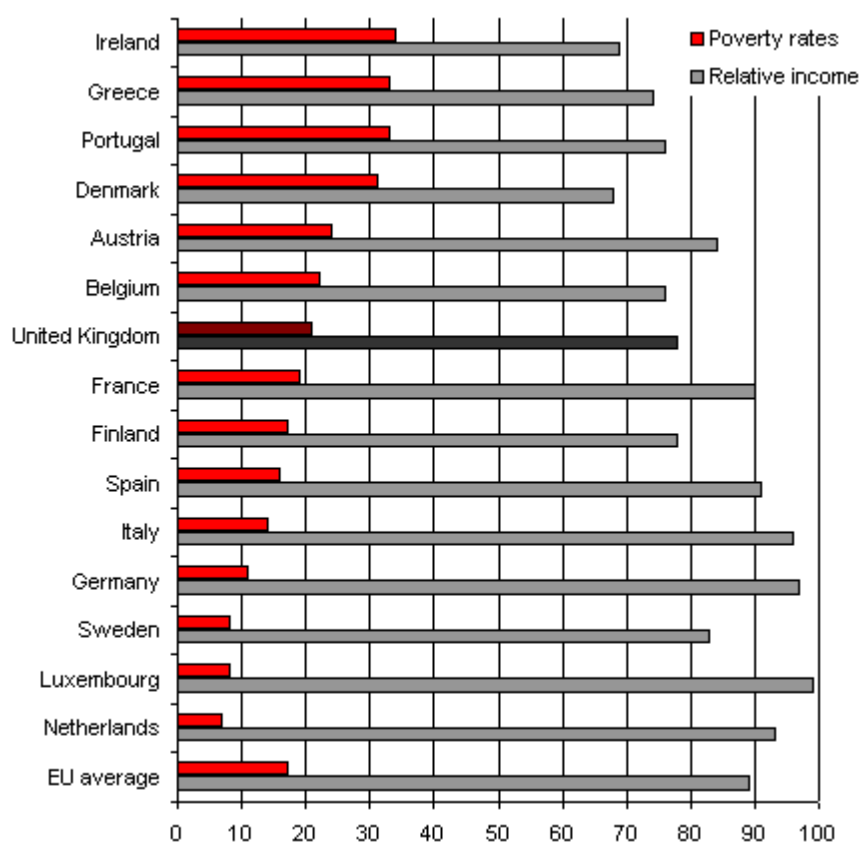
⁸⁷ Disabled are defined as claimants with the disability premium.

⁸⁸ Lone Parents are defined as single claimants with dependants not receiving the disability or pensioner premium.

Table 4.5

Poverty Rate¹ and Relative Income² of People Aged 65 and Over: EU Comparison, 1998

Percentages



1 Percentage with income below 60 per cent of the median equivalised income of the national population.

2 Median equivalised income of those aged 65 and over as a percentage of the population aged 0 to 64.

Data for Table 4.5

Poverty Rate and Relative Income of People Aged 65 and Over: EU Comparison, 1998

	Percentages	
	Relative income	Poverty rates
EU average	89	17
Netherlands	93	7
Luxembourg	99	8
Sweden	83	8
Germany	97	11
Italy	96	14
Spain	91	16
Finland	78	17
France	90	19
United Kingdom	78	21
Belgium	76	22
Austria	84	24
Denmark	68	31
Portugal	76	33
Greece	74	33
Ireland	69	34

[Source: National Statistics. *Social Trends*, 38 (1998)]

In 1998, pensioner poverty rates in Scotland were measured at approximately 28%.⁸⁹ Because this data would have been averaged into the UK rates in the table from Social Trends (1998), the margin between Scotland and the rest of the UK would be closer to 10%. In actual terms, the proportion of Scottish pensioners in poverty was 50% greater than those in England and Wales. In comparison to the EU, these proportions were even greater. Other factors such as poor health, childhood poverty, and premature death were similarly concentrated in Scotland in the 1990s.⁹⁰

⁸⁹ G. Palmer, T. MacInnes, and P. Kenway, *Monitoring Poverty and Social Exclusion in Scotland* (2006), p.9.

⁹⁰ G. Palmer, et al., *Monitoring Poverty*, pp. 50-3.

The rise of the British Welfare State was an evolutionary development in government, and must be understood in the wider context of modernisation in the west. In the late nineteenth and early twentieth centuries, European nations undertook this process with varying effect. (See Table 4.5) Addressing similar issues such as the negative consequences of industrialisation, urban overcrowding, and economic and social exclusion, the social question was a central feature in welfare state discourse. How Britain addressed concepts such as welfare and citizenship in the post-war period suggests that government had a separate agenda in which retaining economic and military supremacy was prioritised over social policy. The outcome was a weak central government, which shared powers with regions, local authorities and the voluntary sector in the execution of welfare state provision. While this form of governance has been problematic for a wide sector of British society, a decentralised state was an opportunity for Scotland to pursue devolutionist social policies. Welfare state legislation in the post war period furthered this process. Scotland's social welfare policies in the final decades of the twentieth century can thus be understood as part of a political process as well as a corrective for inadequate pension provision in Westminster.

THE PARISH AND THE BUROO⁹¹: SOCIAL WORK IN THE COMMUNITY (4.3)

An outcome of British Welfare State legislation in the 1940s, the provision of social welfare for the elderly became a formalised function of the local authority.⁹² In the immediate period after the National Assistance Act (1948) passed, this process suffered from a lack of cooperation at the community level. Therefore, domiciliary services and housing remained inadequate for a large portion of the older population in Great Britain. Contemporary sources suggest that in Scotland this state of affairs was comparatively worse, aggravated by regional differentials and inequalities. In the 1960s, dissatisfaction with government policy, both in terms of the welfare state and anti-inflationary economic strategies, compelled interested groups⁹³ to investigate some of these problems. Subsequent reports and studies indicated that legislation was necessary to enforce care in the community. Therefore, the passing of the Social Work (Scotland) Act 1968 has been viewed as a landmark piece of Scottish legislation by such bodies as the Association of Social Work Directors⁹⁴ for the benefit of all vulnerable sectors of society⁹⁵. However, this interpretation must be re-examined using a different line of inquiry. What were the political implications of Westminster 'sharing' statutory powers with the community? The

⁹¹ In the Scots language, the *buroo* is colloquially 'the Department of Health and Social Security', i.e., 'the Bureau', and is used in reference to formal welfare state benefits and services among older populations in urban Scotland.. J. Corbett, "West Central Scots", *It's Yer Ain Tongue: Scots Language Centre* (c.2007). <www.scotslanguage.com>

⁹² Section 21 of the National Assistance Act (1948) laid upon councils the duty to provide residential accommodation for older people, and sections 29-31 empowered the same authorities to provide home helps, meals on wheels and recreation for the elderly either directly or through the agency of voluntary bodies.

⁹³ In addition to the work conducted by R.M. Titmuss, P. Townsend and B. Abel-Smith, various Scottish medical investigators and government agencies such as the Ministry of Health reported that social services for older people were not provided on an equal basis. Larger questions concerning government policy in general were addressed in Scotland in the political sphere.

⁹⁴ Social Work legislation has been described as innovative and enlightened, and has been used as an exemplar to further political ends such as devolution. Association of Directors of Social Work Archive, *Administrative History* (2007). <www.gcal.ac.uk>

⁹⁵ The main area of emphasis in the Social Work Act and subsequent Social Work programmes has been children. Indeed, the much-praised Kilbrandon Report (1963) focused on how best to deal with 'at risk' children and young people in the court system.

rediscovery of poverty and higher incidences of social problems in Scotland coupled with questions about the relevance of a 'British' welfare state challenged the Wilson Government to extend formal social welfare responsibilities to Scottish local authorities. In 1968 parliament established Social Work, a specific administrative body with a prescribed set of roles and duties in Scottish local authorities.⁹⁶ Thus policies set forth by prior governments indicated a long-term agenda for a limited central government role in the implementation of welfare state services. However, an examination of the performance of Social Work in the period proved that the autonomous nature of community care had not resolved the problem of inequality on the basis of region or socio-economic status between older population groups.

A politically-motivated solution to a range of social and economic problems, Social Work was established as a municipal resource in Scotland in 1968. The historical implications of the status of Social Work were closely linked to the formalisation of social work as a professional activity within the community. Contemporary theoretical arguments addressed this embeddedness in two ways. Firstly, social work was presented as an apolitical activity, indeed, a moral imperative whose function in the community was to 'tidy up societal loose ends and casualties'.⁹⁷ The drive to ameliorate the concerns of the individual had its roots in the Scottish social tradition being analogous to the Calvinist voluntary principle, giving social workers in Scotland a unique professional status.⁹⁸ Secondly, social work acted as a legitimate pressure group operating within

⁹⁶ Although these powers had been nominally assigned to councils in 1948, a separate 'Scottish' act to establish administrative bodies was deemed necessary at this time. The parallel with the creation of the Board of Supervision in 1845 under the New Poor Law should not be overlooked.

⁹⁷ C. Pritchard and R. Taylor, *Social Work: Reform or Revolution?* (1978), p.1.

⁹⁸ The University of Edinburgh Social Work department has published a definition of the role of social work in society in these terms: 'The social work profession promotes social change, problem-solving in human relationships, and the empowerment and liberation of people to enhance well-being. Utilising theories of human behaviour and social systems, social work intervenes at points where people interact with their environments. Principles of human rights and social justice are fundamental to social work.' University of Edinburgh, School of Social and Political Studies. <<http://www.socialwork.ed.ac.uk/social/about.html>> [Accessed 5 January 2008]

socio-political structures, and campaigning for specific changes in policy and problem-solving strategies⁹⁹, for instance, the extension of welfare services was a key component of the social work agenda in the 1960s. Both of these theoretical positions provided an explanation regarding the role social workers played within the community. Social Work legislation impacted on this framework by enabling Scottish Local Authorities to establish and manage social work service structures. Empowered politically, Social Work was thus accountable to meet statutory requirements as an agent of the welfare state.

A consequence of the prolonged period of post-war economic recovery and economic crises in the 1960s, progress in the establishment of sound social welfare services in the community was uneven. Specific problem areas which had persisted for older people were reported in Scottish social investigations between 1957 and 1964. In addition to the many sources which tended to concentrate on Glasgow, a collection of medical surveys using Dundee and Edinburgh as case studies also provided useful data, thus contributing to a far more representative study of the Scottish experience. The analysis of these latter sources draws attention to various problems in the community which were aggravated by the lack of systematic welfare services in Scotland. Firstly, older people in Scottish communities composed a disproportionately higher number of total recipients of National Assistance (NA). For example, in 1954 between thirty-eight and forty per cent of older people in Dundee were in receipt of NA, in comparison to the national (British) average of 24% in the same age cohorts. The figures for Dundee tenements such as those in the Hilltown area were marginally higher.¹⁰⁰ Secondly, formal domiciliary services in Dundee were severely deficient. Reliance on the [overstretched] voluntary sector and personal friends for local provision of domiciliary services restricted

⁹⁹ C. Pritchard and R. Taylor, *Social Work: Reform or Revolution?* (1978), p.1.

¹⁰⁰ A. Mair, I.B.L. Weir, and W.A. Wilson, 'The Needs of Old People in a Scottish City I', *Public Health* **70** (1957), p. 110.

many older people in the capability of running their households.¹⁰¹ Lastly, chronic problems with poor housing conditions, which tended to present special problems to older people in Dundee, were similarly reported in a 1964 study of Edinburgh. In an assessment of needs, Williamson, *et al*, found that over a quarter of the housing of older people was unsatisfactory. 'Conditions varied widely...and included couples in decaying tenements whose worn, dark, and winding stairs were so dangerous as to render them housebound'.¹⁰² Adequate means of satisfying all the needs of older people therefore did not exist in Scottish local authorities. From this it can be argued that Government's expectation for each Local Authority (LA) to independently create the appropriate infrastructure and implement a breadth of personal services for an increasing number of population groups was unrealistic.¹⁰³

With a view to meeting the long-term needs of the elderly, the Ministry of Health conducted a comparative study of thirteen British local authority areas in 1968. The Ministry's ten-year plan to develop community care was a response to many of the problem areas indicated in previous studies as well as its own findings.¹⁰⁴ Indicative of the limited number of places in local authority houses and households in receipt of personal services, plans included an increase in the proportion of sheltered housing and domiciliary services such as home helps. Evaluation of domiciliary services in particular revealed that there were significant differences between areas in the provision of these services. The range of services between councils was explained thus: 'One is a County Council [English] which has a high economic status and a low proportion of old people,

¹⁰¹ A. Mair *et al*, "The Needs of Old People in a Scottish City II", *Public Health* **71** (1957), Pp. 114-115.

¹⁰² J. Williamson *et al*, "Old People at Home: Their Unreported Needs", *The Lancet* (23 May 1964), Pp. 1,119-1,120.

¹⁰³ In the conclusion of Dr Mair's study of the needs of old people in Dundee, he suggested that 'Central Government provisions and Local Authority services cannot hope to satisfy in detail, with the flexibility and comprehensiveness that is required, all the needs that may arise'. A. Mair *et al*, "The Needs of Old People in a Scottish City II", p. 115.

¹⁰⁴ Social investigations conducted in this period operated as leverage for Westminster's policy to legislate the establishment of unified social service departments in Local Authorities. This pluralistic approach was recommended in the Seebohm Report. BPP. *Local Authority and Allied Personal Services* (1968).

the other is a County Borough [Dundee] with a low economic status and a high proportion of old people'.¹⁰⁵ It was quite evident that the social welfare infrastructure within local authorities had progressed, to the extent that each authority provided the same nature of services such as Meals-on-Wheels and Home Helps. However, provision of these services was unequal. Regulations and the manner in which these services were conducted were variable. Three areas in Scotland, Dundee, Coatbridge, and Buckie (Banffshire), received less services than those in England. Therefore, while some older populations received fairly adequate home help, a large concentration of people in poorer areas like Dundee did not receive the same level of provision. Proportionately twice as many pensioners received Home Help in Coatbridge than those in Dundee.¹⁰⁶ Furthermore, there were no paid full-time home helps in Buckie, an indication of a lack of part-time employment for women, and hence much reliance on voluntary services.¹⁰⁷ In respect to gender, it was noted that a concentration of services were provided to women in older age brackets in Dundee in comparison with a younger group of women in Coatbridge.¹⁰⁸ Thus women below the age of 70 were less likely to receive home help in Dundee than in Coatbridge. Older men received home help services in a more equitable manner. This can in part be a reflection of the Local Authority's policies: in practice, older people co-residing with family members did not receive domiciliary services. Because older Dundonian women were more likely to co-reside with family members in this period of time, the local policy was a punitive one. The overall findings in the study provided scope for further inquiry: how did Westminster respond to the problems of inadequate and unequal provision of social welfare services for the elderly in Scotland?

¹⁰⁵ A.I. Harris, *Social Welfare for the Elderly: a Study in Thirteen Local Authority Areas in England, Wales and Scotland* (1968), p. 3.

¹⁰⁶ Harris, *Social Welfare for the Elderly*, pp. 473, 517.

¹⁰⁷ Harris, *Social Welfare for the Elderly*, p. 563.

¹⁰⁸ Harris, *Social Welfare for the Elderly*, pp. 478, 522.

The social conditions which prompted Social Work legislation in the 1960s were only part of the rationale for formalising social services in the community. Reform in the formal sector rested largely upon political agendas in Westminster and Scotland respectively. Thus, interpretations of the Social Work Act must first be contextualized within the political climate of Scotland at the time, as it raised questions about the salience of a British Welfare State. The underpinnings of these debates lie in the disintegration of the British Empire, the demise of (British) nationalist sentiments and frustration with the Labour Party. From these discontents a distinctly Scottish political project emerged.¹⁰⁹ In the 1960s, the Scottish National Party (SNP) challenged the Labour hegemony in a landmark victory in Hamilton by-election in 1967 by Winnie Ewing. In the short-term the SNP's success in taking Labour's safest parliamentary seat in Scotland gave dramatic potency to the Scottish question: 'A vote for the SNP came to be regarded as an act of protest, a manifestation of Scottish discontent about government policy rather than a commitment to Scottish independence'.¹¹⁰ The expansion of Scottish nationalism and the possibility of the break-up of Britain posed a potential threat to the fiscal basis of the British welfare state and recognition of this forced the Wilson government to consider the expediency of separate social welfare legislation for Scotland in 1968. Ultimately, whether this served Westminster's agenda as well remains to be seen.

In the political milieu of nationalism and progressivism, the Social Work (Scotland) Act 1968 created social work departments and established social work as a professional service within local government. The Act brought together existing provisions for children, elderly people, physically and mentally handicapped people and probationers into a comprehensive service.¹¹¹ A review of the components of the Social Work Act draws attention to the balance of powers and duties in the promotion of social

¹⁰⁹Knox, *Industrial Nation*, pp. 298-303.

¹¹⁰ T.M. Devine, *The Scottish Nation* (1999), pp. 574-5.

¹¹¹ Association of Directors of Social Work Archive, *Administrative History* (2007). <www.gcal.ac.uk>

welfare by local authorities. In the first instance, administration was shared between the Director of Social Work, members of the Local Authority, and the Secretary of State for Scotland. While the duties of enforcing and executing the provisions of the Act fell to the Director, he could only ‘hold his office during the pleasure of the local authority’.¹¹² It is worth noting that the language used in this respect is distinctly paternalistic in nature, thus providing Local Authorities with specific powers reminiscent of élite burghal infrastructures in the modern period. Local Authorities were similarly accountable, and were to perform their functions under the general guidance of the Secretary of State. Thus administration of Social Work was a partnership between local government and the Scottish Office, as Westminster’s representative. In terms of the intended duties of Social Work, every local authority was to promote social welfare as may be appropriate for their area.¹¹³ Provisions for older people were generally defined in two ways: firstly, it was the duty of every local authority to provide adequate provision of home help; and, secondly, the provision and maintenance of residential establishments.¹¹⁴ It must be stressed that the Act did not explicitly allocate services for older populations in particular. However, as a piece of legislation, the Social Work Act is significant for its creation of a uniquely Scottish administrative body which would provide a breadth of social welfare services in the community.

Collaboration between Social Work and Parliament was essential in the first years after the 1968 Act was passed. The provision of housing for older people in the local authority was reliant upon unified policies. Accordingly, the Scottish housing programme during the years 1965 to 1970 facilitated this process. Several years before the Social Work Act passed, the Scottish Development Department published the Government’s intention to give housing a greater priority. The initial aim was to build about 50,000

¹¹² BPP, *Social Work (Scotland) Act, 1968* (1969), Part I 1 (1); 3(5); 5(1).

¹¹³ BPP, *Social Work (Scotland) Act, 1968* (1969), Part II 12 (1).

¹¹⁴ BPP, *Social Work (Scotland) Act, 1968* (1969), Part II 14 (1); Part IV 59 (1).

new houses a year in Scotland, an increase of forty per cent over the 1964 level.¹¹⁵ Council houses were constructed in due course, thereby ameliorating chronic shortages in affordable housing. Although a majority of new houses were specifically built for younger families, Local Authority homes for the elderly were also added to the housing stock. Social Work statistics indicate that between 1962 and 1972, the number of homes increased from 171 to 217, which translated to an additional one thousand older people moving to newly-constructed accommodation.¹¹⁶ Local Authorities also took over the management of housing previously run on a voluntary basis. By 1972, more than half of older people's residential accommodation in Social Work's remit was owned by the Local Authority.¹¹⁷ Recollections of this process reveal the social impact of re-housing upon older people and their families.¹¹⁸

We all shared a two-roomed house in Lochee growing up, my Gran in the kitchen, Mum and Dad in one room, and the kiddies in the other. There were nine of us at one point. In 1969, I recall the year, my parents and younger brothers moved to the new estate [Fintry], leaving my grandmother behind. For them it was like moving into a palace...all new amenities, and such big rooms! But my grandmother was happy too. For the first time in her life, she'd have her own room.¹¹⁹

However, in spite of the optimism surrounding the introduction of the Social Work Act in 1968, the impact on the elderly was short-lived as priorities driven by changing economic circumstances after the oil price rise in 1973 shifted and public expenditure declined. There was little effort by the state to expand housing policy towards the elderly or social work legislation until the 1980s; although, in saying this other social work services for older people fared marginally better.

¹¹⁵ Scottish Development Department, *Scottish Housing Programme 1965-1970* (Cmnd. 2837, 1965).

¹¹⁶ Social Work, *Scottish Social Work Statistics* (1971-1973), pp. 24-25.

¹¹⁷ Scottish Education Department, *Social Work in Scotland in 1971* (Cmnd. 5136, 1972), p. 21.

¹¹⁸ Household surveys generally found that Local Authority housing offered better living conditions than voluntary or privately rented housing. Scottish Development Department, *Housing in Clydeside 1970: Reports on a Household Survey and a House Condition Survey in the Central Clydeside Conurbation* (1970).

¹¹⁹ *Interview with Pat Boylen*, Broughty Ferry (27 August 2004).

Unlike the provision of housing, domiciliary services in the Local Authority were more widely accessible to older people on a consistent basis throughout the period. An analysis of two services provides some understanding of how this came about. Development of Meals-on-Wheels services benefitted from investment in the public and private sectors in the 1970s. By 1973, meals service was an expanding industry throughout the UK.¹²⁰ Provision was made in older people's homes as well as in a growing number of day centres and older people's lunch clubs. For the most part, service in Scottish Local Authorities remained steady throughout the period. In 1973, approximately 1,708,000 meals per annum were provided in this manner¹²¹; by 1980, the number of meals had only increased to just over 1,800,000, equating to 15,000 older people receiving meals throughout the week.¹²² As a formal service provided by Social Work, Meals-On-Wheels has qualitatively improved the daily lives of older people. Similarly, Home Help services have contributed to an independent lifestyle among a growing sector of older population groups. It has been argued that of all the social services provided to the elderly, few activities have had more impact on the community than Home Help.¹²³ These services became increasingly important as older people began living on their own. Specific data from Scottish Executive reports signified an increase of sheltered accommodation in line with the growth of Home Help services between 1980 and 1999 (see Tables 4.6 and 4.7). An assessment of the social value of domiciliary services and housing provision over the past two decades cannot be limited to statistical data and by using material obtained in the oral history project conducted in Dundee and Edinburgh in 2004 a more rounded evaluation can be arrived at.

¹²⁰ D.S.S Hutton, V. Imber, and H.D. Mitchell, "Personal Social Services Statistics", *Journal of the Royal Statistical Society* **137:4** (1974), p. 493.

¹²¹ Social Work, *Scottish Social Work Statistics* (1971-1973), p.24.

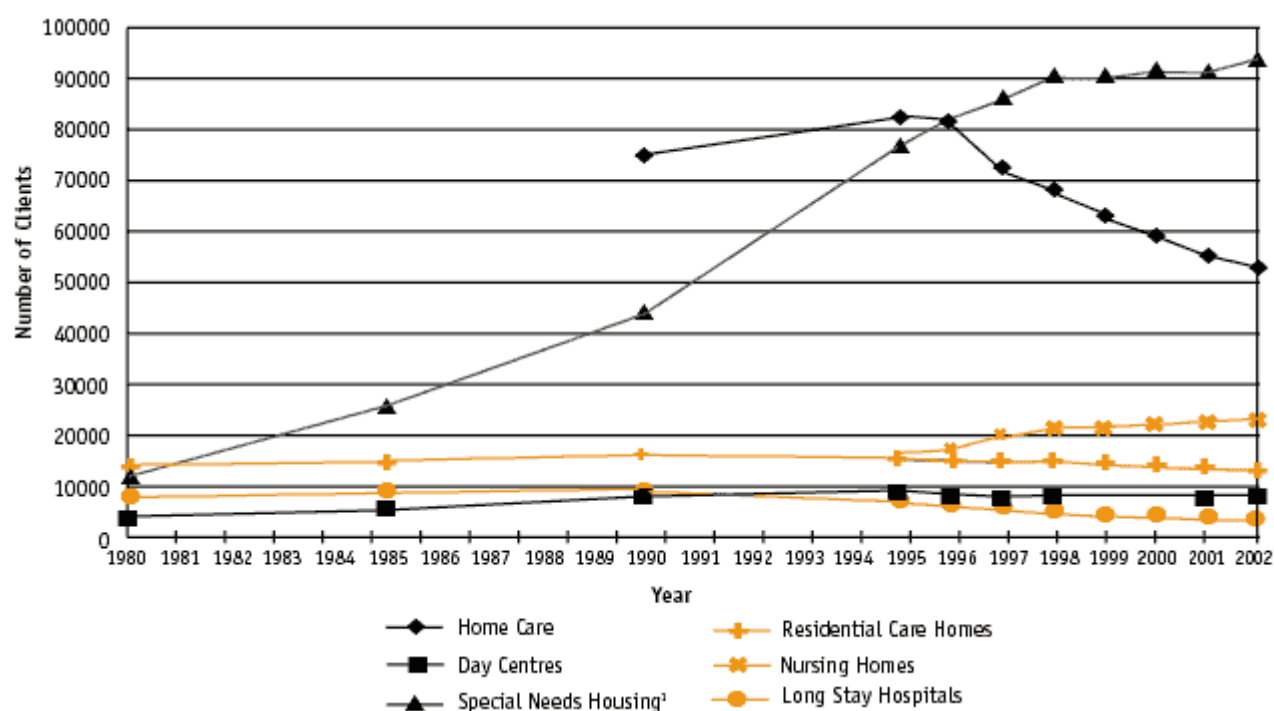
¹²² Personal calculations using data from Table 4.1.

¹²³ D.S.S Hutton, et al, "Personal Social Services Statistics", p. 494.

Table 4.6 Care of Older People in Scotland: 1980 to 1997

	1980	1990	1991	1992	1993	1994	1995	1996	1997
Residential Accommodation									
Residential Care Homes									
Number of residential places	14,409	18,346	18,171	17,937	17,920	17,471	16,988	16,879	16,527
Number of residential places per									
1,000 population aged 75 and over	54.1	55.9	55.4	54.9	55.7	55.0	51.8	50.6	48.8
Ratio of residential places (LA: Private: Voluntary)	65:1:34	53:22:25	53:24:23	52:24:24	51:25:24	51:26:24	49:27:23	48:26:25	47:28:25
% of residents aged 75 and over	78	87	88	89	88	88	88	88	88
% of residents aged 85 and over	36	46	48	50	51	52	53	53	53
% of admissions during year aged									
85 and over	30	38	40	39	42	42	42	43	45
Sheltered Housing ⁽¹⁾									
Number of dwellings	8,476	29,312	31,550	32,528	33,190	34,194	34,358	35,474	36,847
Number of dwellings per 1,000 population aged 65 and over	12	39	41	42	43	44	44	46	47
Private Nursing Homes									
Number of places	n/a	9,901	11,898	14,161	16,477	17,331	19,020	21,400	22,831
Day Care									
Day Centres (See Annex A, note 3)									
Total number of day centre places ⁽²⁾	3,625	7,704	7,715	7,969	8,280	8,294	8,336	7,579	7,309
Total number of day centre places per 1,000 population aged 65 and over	5.0	10.1	10.0	10.3	10.7	10.7	10.7	9.7	9.3
Ratio of day centre places									
(LA: Registered)	42:58	53:47	56:44	54:46	53:47	61:39	59:41	65:35	66:34

Table 4.7 *Care in the Community: Numbers of Older Clients in Receipt of Community Care and Housing in Scotland, 1980-2002.*

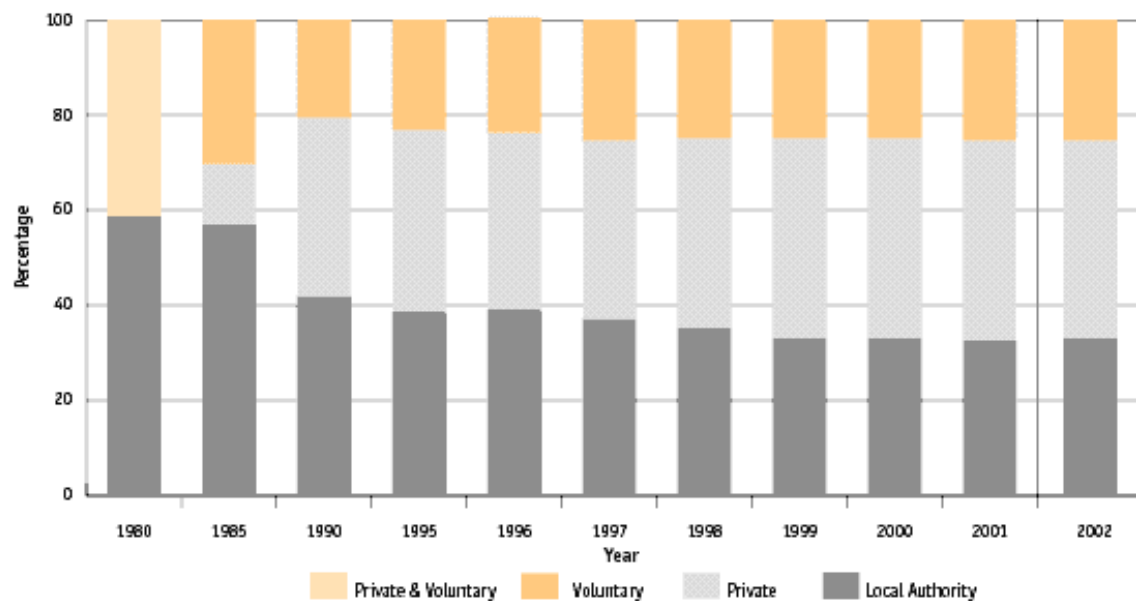


[Source: Scottish Executive, *Scottish Community Care Statistics* (2002), p. 11]

In the twenty-year period, two patterns emerge which illustrate the impact of community services upon older people's daily lives. Firstly, from 1980, local provision of special needs housing increased ten-fold in Scotland. In addition to sheltered accommodation managed by Scottish Local Authorities, purpose-built housing for older people became much more accessible. By 1999, 34% of older people lived in Local Authority Housing under the auspices of Social Work.¹²⁴ Secondly, the steady growth of day centres throughout the period reflected a general trend towards collaboration between Social Work and voluntary bodies, which had also provided these services; in the 1990s, many of these voluntary organizations merged with Social Work in this respect.

¹²⁴ Scottish Executive, "Housing Tenure by Age of Highest Income Householder, Scotland 1999" in *Equality in Scotland- Older People* (1999).

Table 4.8 *Mixed Economy of Formal Care in the Community: A Measurement of Older People's Use of Scottish Formal Sectors in the Period 1980-2002, by Percentage.*



[Source: Scottish Executive, *Scottish Community Care Statistics* (2002), p. 13]

In the period studied, nearly half of local authority sources of formal care were offset by those in the private sector. Because local authority services had remained relatively constant in the period, the actual significance is that a specific proportion of the older age cohort in this period made more use of the private sector. This can in part be attributed to greater access to finances. However, greater use of the private sector, principally in terms of health care, was a measure of long waiting lists and poor quality services in the local authority. Growth in the private sector in the 1990s raised fundamental questions about older people's accessibility to formal sources of care in the future.

An assessment of Social Work since 1968 reveals its growing importance in Scottish Local Authorities as a resource for older people. Distinct from specific benefits obtained from the Welfare State, social services provided in the community have more directly impacted older people's lives. This was made apparent in a series of interviews conducted in a variety of private homes, sheltered accommodation, and community centres in Edinburgh and Dundee. Respondents referred to three separate points. Firstly, 'Social Work', albeit a vehicle of the welfare state, was not directly associated with Westminster or the Scottish Executive per se. Although the professional role of social work was acknowledged, the comparatively informal nature of various domiciliary services was stressed. 'There's no shame in askin' for a little help around the hoose from the Social Work'.¹²⁵ Secondly, various staff from Social Work helped people navigate their way through the formal side of applying for specific services that they were entitled to. In day centres or in the privacy of their own home, older people became more aware of their rights as consumers. This was attributed in part to the sense of empowerment many social workers provided older people in these negotiations. 'I have no doubt I'm getting what I need. My social worker advocates for me'.¹²⁶ Lastly, housing issues were addressed, albeit in less glowing terms. Interviews conducted in two different Social Work properties provided insights into the uneven reports in this regard. Within a half-mile radius in Dundee, the Social Work accommodations inhabited properties which were radically different from each other. A set of purpose-built bungalows near the Wellgate provided comfortable and safe accommodation in a garden-like setting. Contrastingly, the Russell Place sheltered accommodation was formerly a Council 'Multi' tenement block in the Hilltown. The vast inequality between the two settings was

¹²⁵ *Interview with Maria Anderson*, Russell Place Sheltered Accommodation, Dundee (10 August 2004). Mrs Anderson's house was beautifully kept, a common feature for all the houses I was invited to during this project. Upon inquiry, she replied that this would have most likely been the benefit of home help through Social Work.

¹²⁶ *Interview with William O'Shaughnessy*, Five-Ways Age Concern Day Centre, Dundee (8 July 2004). Mr O'Shaughnessy had several disabilities for which he required various services and adaptive apparatus.

explained as the consequence of the problem of long waiting lists for places in Local Authority housing. The general impression that arose from the interviews concerning Social Work as an administrative body was that over the past few decades, local concerns were distinctively addressed quite independently of other authorities. Present concerns about whether this sense of autonomy will remain are in response to Scottish Executive's ambitious plans for the provision of older people's services.

In the immediate period after devolution, Social Work and care in the community came under close scrutiny in various quarters. In 1999, the newly elected Scottish Executive made an inquiry into the delivery of community care. They addressed various problems such as the absence of management development and strategic planning in Social Work: 'The stakeholders in community care should jointly agree on a common set of strategic planning concepts, procedures and tools to include common financial and service data sets ...and common strategic planning cycles'.¹²⁷ Scottish Executive's political aims such as regulation, accountability measures and equalisation in the provision of services were a response to the problems associated with the lack of collaboration and centralisation. Indeed, the historical precedent of providing social services in virtual political fiefdoms in the modern period has bequeathed a legacy of regional inequality in the recent past. Such inequalities have been regularly addressed for the past few years in the press, in which the specific practice of rationing older people's services in poorer areas has been reported. Dundee Councillor Ian Borthwick met with Social Work in March of 2006 to discuss the long-term problem of postcode lottery provision of personal care for older people. 'The Social Work department does a very good job and there are a lot of good services going on. However, I think there has to be a proper assessment as to why this is occurring. If there is rationing, and rationing quite

¹²⁷ Scottish Executive, *Inquiry into the Delivery of Community Care in Scotland: Response by the Scottish Executive* (1999), line 28.

clearly is working here, then the criteria and applications policy has to be clearly laid out to elected council members.’¹²⁸ While many of the problems Social Work has encountered have been political and economic in nature, older people have expressed a different set of concerns. A number of Scottish review panels concluded that services delivered by the Social Work department were not what the user wanted, and the feeling was that community care services must be individual, recognising both service users’ unique needs, and the other support available to them. Ultimately, older people who made use of social services felt that services should be about choice and control as consumers.¹²⁹ Although critiques of Social Work’s performance in Scotland in more recent years have rightly brought attention to the inadequacies of the system at present, Social Work as an institution must be analysed as an historical process in the evolution of the British Welfare State.

In an analysis of the incidence of autonomous Scottish legislation in the period leading up to devolution, it has been suggested that ‘there were occasional innovations like the Social Work (Scotland) Act 1968 and education which did have its own rather distinct policy community. [However] in some fields, Scottish deviations from England were usually due less to the strength of Scottish institutions than to their weakness’.¹³⁰ It would seem that Parliament’s handling of social welfare policy was less an aspect of weakness but deliberate policy. Nonetheless, the point is taken that existing social welfare infrastructures in Scotland in 1968 were patchy at best. While much progress has been achieved in the period concerning housing, domiciliary services, and social services, the range and level of collaboration generally fell short of what was required to ensure that individuals received the continuous and comprehensive care they needed. In most areas,

¹²⁸ M. Bowman, *Evening Telegraph News*, (29 March 2006)

¹²⁹ B. Kerr, J. Gordon, C. MacDonald, and K. Stalker, *21st Century Social Work Review: Effective Social Work with Older People* (2005), pp. 12-13.

¹³⁰ M. Keating, L. Stevenson, P. Cairney and K. Taylor, “Does Devolution Make a Difference? Legislative Output and Policy Divergence in Scotland”, *The Journal of Legislative Studies* **9:3** (2003), p. 111

the barriers to Social Work collaboration between Local Authorities remained firmly entrenched. Like those in the rest of Great Britain, these underlying difficulties were reinforced by the conflict between central and local government over the latter's powers and budgets.¹³¹ A product of local self-interest, Social Work is limited by the specific communities they serve. Thus inequalities within older populations have been further reproduced over the past three decades.

¹³¹ G. Wistow, "Home Care and the Reshaping of Acute Hospitals in England- An Overview of Problems and Possibilities". *Journal of Management in Medicine* **14:1** (2000), p.7.

THE VOLUNTARY SECTOR: SELF-HELP AND AUTONOMY (4:4)

Throughout the period 1845 to 1999, a feature of modernity has been the perpetuation of social and economic inequalities, most acutely concentrated in vulnerable populations groups such as the elderly. Various attempts to ameliorate these social problems reveal that Scottish society has depended largely upon philanthropy and self-help organisations. An historical analysis of both secular and church bodies indicated a progression from Evangelical civilising missions and an emergent Socialist agenda in the nineteenth and early twentieth centuries to the formalisation of charitable groups under statutory policy in the post-war period. Rooted in the proliferation of nineteenth-century social reforms and political movements committed to addressing the ‘social question’¹³², the voluntary sector (or what is termed ‘The Third Sector’¹³³) has provided older people with social and economic resources as a complement to those from local authorities and the state. Although most western modern welfare state nations have similar arrangements, the distinctive voluntary nature of social service provision in Scotland throughout the period raises questions as to the continued rationale for this Christian paternalistic model of support for older people. Driven by Calvinist¹³⁴ principles of social

¹³² Between c. 1870 and 1914, the circumstances in which the working classes were working and living dominated contemporary discourse. The ‘social question’ addressed individuals as well as local and national governments. Historical research on this subject has tended to be concentrated upon the political implications, such as social policy and the foundation of the modern welfare state. W.W. Knox concentrates upon the relationship between the Scottish Church and political movements in their attempts to resolve the ‘social question’, providing a useful context for the early twentieth century. W.W. Knox, ‘Religion and the Scottish Labour Movement, 1900-1939’, *Journal of Contemporary History* **24:4** (1988).

¹³³ The Third Sector define themselves thus: ‘The third sector is a diverse, active and passionate sector. Organisations in the sector share the common characteristics of being non-governmental organisations which are driven by their values and which principally reinvest any financial surpluses to further social, environmental or cultural objectives. It encompasses voluntary and community organisations, charities, social enterprises, cooperatives and mutuals both large and small’. Office of the Third Sector (2007) <http://www.cabinetoffice.gov.uk/third_sector> [21 December 2007].

¹³⁴ Presbyterian practices are strongly rooted in the concept of social responsibility- both in terms of the self and the community. C. Brown, *Religion and Society in Scotland Since 1707* (1997).

responsibility and Scottish applications of ‘self-help’¹³⁵ ideology and fictive kin networks, older people’s advocacy groups and charities have achieved social welfare ends within the community. Indeed, the charitable face of social services is perceived more favourably than formal statutory welfare services. Furthermore, Scotland’s voluntary sector uniquely functions as a vehicle for autonomy. In terms of the individual as well as the collective, the Scottish voluntary sector provides autonomy for older people within their communities, and respectively, local charities with relative autonomy from Westminster. A source of continuity between the past and present, the Third Sector is a vital organ of the modern welfare state.

The role of the voluntary sector in Scottish society has remained an important prop for charity and reform in the modern period. Building upon a strong religious component, philanthropy in the late nineteenth century was exercised as an interpretation of the social contract. In the period from 1890 until the outbreak of the First World War, Scottish Presbyterian reformers cooperated with a view to resolving the ‘social problem’.¹³⁶ Hence, the Kirk emerged with a new political agenda. In his examination of the interconnection between political reform and Presbyterianism, W.W. Knox stressed that ‘Calvinism... was still an important agent in shaping the social habits and character of the Scots well into the twentieth century’.¹³⁷ Taking an active approach, reforming Presbyterians worked with many labour leaders and activists; indeed, voluntary activity at that time reflected sacred and secular cooperation. In the 1890s, the Glasgow Church

¹³⁵ Samuel Smiles’ *Self-Help* engendered a strong ethos of self-help among all sectors of Scottish society in the nineteenth century. An advocate of self-improvement across the life course, Smiles featured numerous notable historical figures who improved their lives and communities. A notable example was a passage from a letter penned by Alexis de Tocqueville: ‘There is no time of life at which one can wholly cease from action; for effort without one’s self, and still more effort within, is equally necessary, if not more so, as we grow old, than it is in youth’. A. de Tocqueville, *Personal Correspondence*, quoted in S. Smiles, *Self-Help* (2002), p. 35.

¹³⁶ J. Stewart, “‘Christ’s Kingdom in Scotland’: Scottish Presbyterianism, Social Reform, and the Edwardian Crisis”, *Twentieth Century British History* **12:1** (2001).

¹³⁷ Knox, “Religion and the Scottish Labour Movement”, p. 611.

Labour Group campaigned for social reforms, such as the Old Age Pension¹³⁸. The social problems of the aged poor were further addressed in the Kirk, resulting in the formation of the Christian Social Union (1901) and the Committee on Social Work (1904). Founded by the Reverend David Watson, these voluntary church organisations put into effect the social mission of the church and took action furthering specific reforms.¹³⁹ Organisations such as the Charity Organisation Society (COS) remained influential because of their ‘commitment to prevent poverty without destroying the traditions of independent local responsibility’.¹⁴⁰ The voluntary principle was the cornerstone of what can only be viewed as a marriage of convenience between the Presbyterian churches, Socialist reformers and municipal powers. Such alliances figured greatly in the development of older people’s charities and advocacy groups in the twentieth century.

In spite of the fervour which propelled religious bodies to collaborate with secular ones in the interest of addressing the ‘social problem’, progress in social work was halted by the immediate effects of the Great War and subsequent economic downturns in the interwar period. Consequently, the voluntary sector’s capacity for providing social and economic services for the elderly was severely impaired. Often misinterpreted as a sign of the triumph of state provision over philanthropic impulses¹⁴¹, a majority of voluntary social services and reform movements lost momentum. Notwithstanding church-based sources, very few examples of Scottish secular voluntary organisations progressed in the pensioner movement in the three decades before the Second World War. A notable exception was the Scottish Old Age Pensions Association (SOAPA),

¹³⁸ Knox, “Religion and the Scottish Labour Movement”, p. 614.

¹³⁹ D. Watson, *Social Problems and the Church’s Duty* (1908).

¹⁴⁰ M.J. Moore, “Social Work and Social Welfare: The Organization of Philanthropic Resources in Britain, 1900-1914”, *The Journal of British Studies* **16:2** (1977), p. 104.

¹⁴¹ A vital component in rhetoric against the welfare state, pessimistic forecasts for the future of voluntary work were ubiquitous in old age legislation debates between 1880 and 1940. In addition to critiques from sources such as C.S. Loch, the Presbyterian Church generally argued that pensions should be left small enough so that the virtues of thrift and self-help were encouraged. Brown, *Religion and Society in Scotland*.

founded in 1937 as a self-help, self-advocacy organisation established to influence social policy affecting older people at local and national levels.¹⁴² The first organisation of its kind in the UK, SOAPA has been at the forefront of the pensioners' struggle, and remains entirely staffed by volunteers.¹⁴³ Further studies¹⁴⁴ of voluntarism in the 1930s and 1940s have provided insights regarding the composition of voluntary organisations in the twentieth century. The valuable contribution of women in war efforts, such as those who joined the Women's Voluntary Services (WVS)¹⁴⁵ in the 1940s, shows that; firstly, volunteers have often been women; and, secondly, a number of voluntary organisations became indispensable to the state. The latter consideration of the close relationship between the welfare state and older people's voluntary social services in the post-war period must be explored.

The voluntary sector's close affiliation with the British Welfare State can only be explained as an outcome of necessity and good timing. Because progress in terms of political reforms on behalf of older people and pension policy was sluggish in the period 1914-1940, older age groups' status in the nascent welfare state was not clearly established. Hence informal sources and local charities remained a vital resource for those most in need. However, due to the demands of the Second World War, most voluntary organisations were strapped for resources, and fairly fragmented. The severity of the problems associated with ineffective pension provision compelled twenty national voluntary organisations concerned with older people to join forces with three separate government departments and experienced individuals to address these issues. The result was the formation of the Old People's Welfare Committee (OPWC) in October 1940,

¹⁴² Scottish Old Age Pensions Association (SOAPA): Coatbridge Branch Constitution of the National Federation of Old Age Pensioners Associations, c. 1960. [GB/1778/U84].

¹⁴³ Seniors Network, "A Brief History of the Pensioners' Movement" < www.seniorsnetwork.co.uk > [Accessed 1 December 2007].

¹⁴⁴ See for example J. Hinton, "Voluntarism and the Welfare/Warfare State: Women's Voluntary Services in the 1940s", *Twentieth Century British History* **9:2** (1998).

¹⁴⁵ In the post war period, the WVS played an essential role in providing domiciliary services for older people in Scotland.

and the Scottish Old People's Welfare Committee (SOPWC) in 1943, which most significantly gained official recognition.¹⁴⁶ The implication of centralising older people's voluntary organisations and putting them on the government agenda was monumental. It can be argued that the role that the voluntary sector would play in the remainder of the twentieth century hinged upon this joining of forces. Of equal importance was the subsequent passage of the National Assistance Act 1948, which gave local authorities powers to contribute to the voluntary sector, including providing accommodation, recreation and meals on wheels.¹⁴⁷ This gave the voluntary sector in general a special relationship with the state, and specifically, older people's voluntary groups with a prescribed set of roles and duties. Both circumstances legitimated the status of the voluntary sector as the 'Third Sector' within the British Welfare State.

While the formalisation of the voluntary sector in the immediate post-war period was a matter of expediency for central government, the long-term effects provided Scotland with tremendous powers as to the provision of services for older people. Perpetually hesitant about losing local autonomy to centralisation, official recognition and support of voluntary agencies assured Scottish authorities in these matters. The development of the voluntary sector in the post-war period therefore reflected a two-pronged policy. Firstly, Scottish old-age charities paralleled those founded in England, merely making adaptations regionally to suit particular needs. This can be analysed by exploring the establishment of Age Concern separately in England and in Scotland. A case study of two Age Concern community centres in Dundee provides specific insights into an ethos of equal access to support in old age and the localised nature of Age Concern Scotland. Secondly, numerous voluntary bodies of Scottish origin flourished in the period, often by means of consolidating with both secular and church bodies. These

¹⁴⁶ Age Concern, *A History of Age Concern* (c. 2003).

¹⁴⁷ BPP. *The Public General Acts*. National Assistance Act, 1948. (1948), sec. 21-26.

organisations provided specific social services for the elderly within the community, very often based upon self-help principles. Two case studies of voluntary groups in Edinburgh addresses the synthesis of Presbyterianism, local political infrastructure, and the role of the individual in autonomous agencies. The range of services provided by older people's voluntary organisations in Scotland in the post-war period have been observed to have a more direct impact on the everyday lives of older people and their families than statutory services.

With the aim of addressing the personal and collective needs of older populations in Great Britain, the Age Concern interest group has concentrated on the issues of growing older throughout the post-war period. Bound up with the formation of centralised older people's voluntary organisations in 1940, Age Concern England originated from the OPWC, and respectively, Age Concern Scotland originated from the SOPWC; both gained complete independence from their parent bodies in the 1970s. From its inception, Age Concern represented and championed the welfare of older people in general, and, in particular, promoted local voluntary services for the elderly. The Age Concern movement in England and Scotland has extended its initial 'Manifesto'¹⁴⁸ to a broader remit, such that in more recent decades, both organisations conduct research, publish, campaign, and work in partnership with private, public and voluntary sectors to establish local services. Thus, Age Concern has become an authority on ageing. In light of social and political changes in the 1990s, Age Concern has had to investigate the problem of its appropriate roles as a voluntary organisations in a pluralistic welfare state, and at the regional level, it has had to make accommodations in

¹⁴⁸ The so-called "Manifesto on the Place of the Retired and Elderly in Modern Society" (1975) emphasised the need for more positive attitudes towards older people and put forward specific proposals for improving the quality of later life in the UK. Age Concern, *A History of Age Concern* (c. 2003). The material used for this section was provided in an early draft at the Age Concern Scotland Library in Edinburgh, and has more recently been incorporated onto the Age Concern (England) Website. I gratefully acknowledge the draft I consulted in 2003, and use this with permission of the librarian at the time. Any omissions are my own.

some local organisations. How has Age Concern Scotland resolved the challenge of differing demographic profiles in specific urban areas? The strength of Age Concern Scotland¹⁴⁹ has been the local response to the needs of the community and the provision of reliable community-based services. A comparative examination of two centres in the Dundee area indicates the vital function Age Concern Scotland serves as a voluntary resource in the community.

In 2004, the Age Concern community centres in Broughty Ferry and the Hilltown area of Dundee¹⁵⁰ provided access for an extended oral history project, in which members, as well as the voluntary staff and directors were interviewed. Information about the individual centres was obtained in tandem with the larger question of the constituents of old age over time. The interconnection between the individual and collective experience was made apparent in the group setting of both day centres. Several issues emerged from this process, which illustrate the significance of the local and voluntary nature of such resources. Firstly, the directors carefully made adaptations in respect to the particular area in which the centres were located. The demographic composition and economic status of the members were accounted for, and accommodations were made accordingly. This may have involved something as simple as the staffing process or seating arrangements, or formal requests for help with transport, specific apparatus in the buildings or services to meet individuals' needs. Secondly, Age Concern Scotland's mission to provide equal access to resources was an imperative in both centres. How this was addressed was an aspect of policy as well as discretion on the part of the directors. Local knowledge was key for this process. Thirdly, the voluntary nature of the day centres provided local members of the community of all ages to participate in the provision of social services for the local older

¹⁴⁹ As of 2003, Age Concern Scotland had approximately 500 affiliated organisations. Conversation with Age Concern Librarian, Edinburgh, (29 May 2003).

¹⁵⁰ The following section concerning both day centres is based upon the oral history project conducted between May and August of 2004 for this thesis.

population. An important feature of this was the practice of voluntarism by the members themselves. Many of the older members had in their past been volunteers at the centres, which functioned as a form of reciprocal exchange between generations. This was inherently a source of agency. The voluntary ethos of Age Concern Scotland empowered the members as a whole because resources were provided in a process associated with informal fictive kin networks.

Located in a quiet neighbourhood bridging the commercial and residential zones of the Tayside town of Broughty Ferry, the purpose-built Age Concern community centre provided weekday¹⁵¹ services to 120 local members in 2004. Composed of a mixed group of mostly women aged above 75, the exceptional cases reflected the imperative to adapt for the needs of the community. One such case was a mother and daughter who were both members, primarily to provide the learning disabled forty-five year-old with care in a semi-formal setting. This arrangement functioned both as respite care for the younger woman, and informal status as a voluntary 'member'¹⁵² for the older woman. Ordinarily the minimum age to attend the centre is 55. Along these lines, several other unofficial members in their early seventies played very important roles as volunteers. Margaret Webb had no family in the area, and at the age of seventy-one, was at a crossroads between working life, caring for elderly parents who by 2004 were both deceased, and her own retirement. Because the day centre was located between her home and the town centre, Ms Webb gravitated there several years ago and volunteered her services as an artist and companion.¹⁵³ The emphasis on integrating the community

¹⁵¹ The director mentioned in our interview that for many, the Monday-Friday openings were not enough, and that the 'weekends were very long'. *Interview with Pat Boylen*, Broughty Ferry, 27 August 2004.

¹⁵² A number of men and women who attended day centres emphasized their status as volunteers rather than as members, primarily based on their perceptions of their roles as informal agents of the provision of services to older members as opposed to being the recipients of services.

¹⁵³ *Interview with Margaret Webb*, Broughty Ferry, 4 June 2004. Margaret has undertaken several major beautification projects on the property, including the design and execution of several murals on interior and exterior walls, and a new garden for the courtyard. As a personal touch, the members asked that she include in one of the murals an image of herself with her dog at the Broughty Ferry castle featured in the piece.

within the centre resulted in a family-like environment, in which many members forged ‘fictive kin’ relationships in the absence of local family networks of their own. This crucially improved the qualitative everyday lives of the members because, while middle-class Broughty Ferry is ideally suited for retirement, most members’ families worked and lived at a further distance from the area. In combination with daily activities, visitors, meals, and formalised services provided for all members, the family atmosphere promoted by the Broughty Ferry Age Concern met the particular needs of the local community.

Atop the Hilltown, one of Dundee’s poorest areas, the Five Ways Age Concern had a moderately different set of needs among the clientele drawn from the neighbourhood. A prominent community centre since 1959¹⁵⁴, Five Ways contributed to the daily lives of over one hundred and fifty retired people in 2004. A majority of the older men and women who went to the day centre were formerly employed in the jute industry, NCR, or local services. Different expectations of retirement were thus more essential to address in this location. While group travel was a favoured pursuit in Broughty Ferry, for instance, the Five Way members preferred various games, small-group interest-based activities, live musical entertainment provided at the centre, and generally keeping active. Another difference was that more of the Dundee members had families and marriage partners still living locally, but went to the centre as respite for their husbands and wives. A larger proportion of males attending the day centre thus required the director to seek male volunteers. Typically, most volunteers at senior centres have been women from all age groups.¹⁵⁵ At the time of the interviews, there were two men who worked full-time on a voluntary basis at Five Ways, which met the social needs of many of the members. In respect to the male members, they clearly enjoyed the

¹⁵⁴ In August 2004, Age Concern representatives and the Five Way members honoured Ms Brown with a celebration of her dedicated service as director of the day centre for twenty-five years

¹⁵⁵ *Interview with Irene Brown, Dundee, 24 May 2004.*

presence of younger men in their midst, and were especially happy with the male companionship. Thus, cultural adaptations for the local needs of the community were important attributes of the facilitation of services within a national voluntary organisation.

A recent examination of local bodies in the Scottish voluntary sector provides further understandings of the continued cooperation between the Presbyterian Church and secular sources. Despite the protracted decline in church membership in the course of the twentieth century¹⁵⁶, the Kirk continues to lend its support to various old age charities, day centres, and social clubs. At times a silent partner, the Kirk has worked with various municipal resources like Social Work as well as smaller ventures run by retired people in the community. This was made evident after a series of communications with numerous voluntary organisations in Edinburgh¹⁵⁷, of which those that were not Age Concern, were at least in part affiliated with the Church of Scotland. From a selection of these, two community-based groups were selected to approach for a case study. Both founded in the post-war period by interested members of the Church of Scotland, the Rainbow Club and the Napier Club have in more recent times grown with the needs of their area, and adapted accordingly. While the former has lost most of its ties to the church, other than its location at Drylaw Parish Church, the latter retains close affiliations with the three churches which make up 'Holy Corner'¹⁵⁸ in Morningside. Nonetheless, both organisations rely heavily on volunteers. The Presbyterian voluntary

¹⁵⁶ This theme has been addressed in various works over the past thirty years, including M. Maxwell Arnott, "Social Change and the Church in Scotland", in M. Hill (ed.) *A Sociological Yearbook of Religion in Scotland* 7 (1974); Brown, *Religion and Society in Scotland Since 1707*; and R. Pope (ed.), *Religion and National Identity: Wales and Scotland c. 1700-2000* (2001).

¹⁵⁷ In the interest of obtaining oral history subjects in 2004, many organizations in Edinburgh were approached. A variety of individuals provided instructive insights into the voluntary sector in general. In terms of older people, one of the most helpful of these was Catherine Mein, who has volunteered for the Napier Club for over a decade.

¹⁵⁸ The three churches in the Morningside area of Edinburgh were all located on the corners of the first intersection of Morningside Road. These were the United Church (URC/ Church of Scotland), the Episcopalian Church and the Baptists. Formerly the United Church, The Eric Liddell Centre, which houses the Napier Club, forms one of the corners.

principle and credo of social responsibility remain important fixtures in many older people's groups.

The history of the Rainbow Club is a strong example of the 'self-help' ethos in practice, indicating the long-term effect of just one person. A postman by profession, Danny Akin was quite active in the Drylaw Parish Church. Together with the Archdeacon of the church, he actively sought various methods of bringing the community into the church, such as by sponsoring weekly dances. In the mid nineteen eighties, they specifically spoke about the older members of the church and older people in the surrounding parish. They saw a need for older people to have a place to go, even for just a few hours a week, to meet friends and have a warm meal. They formed the Rainbow Club, and ran it on a voluntary basis until Social Work stepped in.¹⁵⁹ By 2004, the club had become an essential resource in the impoverished community by providing important services and social functions for its older members, including transportation, lunches, varied activities, trips, and perhaps most significantly, socialisation with peers and carers. With the view that the centre was an extension of their households, the Director Jackie Brown and numerous volunteers, of whom many were older themselves, operated as carers who care.¹⁶⁰ She discussed her role in the Rainbow Club at some length.

I love my job...The members here are a very important part of my life. I worry about them like family. If someone doesn't come in, I am on the phone finding out what's going on. I visit members if they can't come in, or send staff to drop in with a note. They ask after my daughter- they have watched her grow up. We are all part of the same community.¹⁶¹

¹⁵⁹ *Interview with Danny Akin*, Edinburgh, 1 June 2004. Mr Akin was extremely humble about his role in the origins of the Rainbow Club.

¹⁶⁰ Walker and Qureshi suggest that there is a distinction between the formal and informal care because "caring for someone in a practical way is seen as an expression of caring *about* them as an individual." H Qureshi and A. Walker, *The Caring Relationship* (1989) p. 20. However, there is much to be said about the quality of relationships and care given in many formal settings. This is a case in point of how formal sector care can be qualitatively equivalent to informal care.

¹⁶¹ *Interview with Jackie Brown*, Rainbow Club Drylaw Parish Edinburgh 1 June 2004

In addition to its social functions, the centre facilitated financial assistance by means of regular visits from Social Work officers, who went to ensure that members got what they needed. The value of the Rainbow Club to its members thus became increasingly vital in the past two decades. Collaboration between individuals and various formal organisations in these endeavours operates as an exemplar of the modern application of 'self-help' ideology in the Scottish voluntary sector.

The influence of the religious sector in the late modern period is evident in a great number of older people's centres and social clubs. One of the most notable of these is the Napier Club and its close relationship with the Eric Liddell Centre. An ecumenical project, the Eric Liddell Centre has provided services to its surrounding community, with particular emphasis on the care of older people. Like many of the larger projects increasingly being undertaken by churches, Chief Executive Officer Bob Rendall explained that the Eric Liddell Centre's work involved a mixture of volunteers and a core of professional expertise. Explicitly Christian in its ethos, the Centre's volunteers came mainly from the churches of Morningside.¹⁶² Alongside its services to dementia sufferers and their carers, the Centre ran a friendship club for elderly people, the Napier Club. Organised entirely by volunteers, Napier has run a lunch club in combination with an afternoon social club for over two decades. Driven by shared interests among a well-educated group of older people, a core body of volunteers arranged discussion groups and invited speakers on behalf of their members. In this latter capacity¹⁶³, the importance of Napier to the Morningside community was made apparent. Because transportation was provided, the weekly events brought several dozen members of the

¹⁶² B. Rendall quoted in D. Lawrence, "Hope on Holy Corner", URC (2003). The Eric Liddell Centre's one-to-one work with dementia sufferers has received wide recognition because it is the only facility in Scotland to offer such care. The centre is increasingly being used as a model by others.

¹⁶³ After conducting over twenty interviews with older people in the Morningside community in 2004, I was kindly invited to speak at two Napier Club meetings by one of the most regular attendees and their secretary, Catherine Mein. (August 2005 and March 2006).

community from a diverse background into regular contact with each other, which would otherwise have been highly unlikely. The result was a unique social network of older individuals, who have served as a vital resource for more than a generation. A clear example of this was explained by Jane Gailey, a former member of Napier.

[After becoming widowed] I was becoming a recluse. I said, I thought to myself 'I must go out and have lunch'. And I went out to the Eric Liddell Centre in Morningside. I heard a whisper somewhere and I saw something on the menu card, [on which] they were advertising you see the fact that they were a charity. So I decided days later to go back and make enquiries about the [Napier] lunch club. I met some very nice people there at the lunch club.¹⁶⁴

Many years later, one of the members of the lunch club recommended a particular sheltered accommodation to which Mrs Gailey moved; she had not until that point been familiar with the place. The spirit of collaboration in Napier was quite abundant. The presence of the church in such organisations raises questions about the strong link between the religious and voluntary sectors. Given the low rate of church attendance among younger generations in the recent past, will older people in the future benefit from such relationships to the same extent? The over-reliance upon religious bodies and their ideology in the provision of social services and welfare for older people may prove to be problematic over time. Moreover, the variation in access to the voluntary sector in Scotland must be resolved.¹⁶⁵

The Scottish system of providing social services for older population groups by means of the voluntary sector acting as a conduit between the welfare state and the individual raises a separate set of questions about the motivations of British government in the post-war period. In the recent past these have been addressed in various sources,

¹⁶⁴ *Interview with Jane Gailey*, Edinburgh 25 May 2004.

¹⁶⁵ Milligan stresses that variations in access to informal care *viz* the voluntary sector can arise as a consequence of political, economic, and historical factors that vary both between local authority areas and within them. C. Milligan, *Geographies of Care: Space, Place, and the Voluntary Sector* (2001), p. 3.

of which many had their origins in the last years of the Conservative Government. Not surprisingly, contemporary debates about the role of the independent sector as an element of supporting older people in the community tended to promote the 'Care in the Community' principle. In a 1996 article in the *British Medical Journal*, S. Barodawala argued that since the implementation of the Community Care Act in 1993, the needs of older people and their carers are more ideally provided by voluntary and private organisations.¹⁶⁶ A comparatively uncritical study of the management of the mixed economy of care also arrived at the same conclusion. However, both failed to address the larger question of the government's obligations towards its older citizens.¹⁶⁷ Employing a different political agenda, researchers in the social sciences have more recently raised questions about the implications of a primarily voluntary form of service provision. Notwithstanding the better quality of care provided by voluntary organisations throughout the UK, institutes such as the Joseph Rowntree Foundation suggest that the government has transferred its responsibilities to the voluntary sector, and that not enough consideration is given as to how the state should act to foster a strong voluntary and community sector.¹⁶⁸ In their political economy approach Brian Dollery and Joe Wallis strongly critique the emergence of the Third Sector, saying that: "The voluntary sector is a response to government failure... Charitable organisations often perform...functions in the human services area to reinforce government agencies where the latter are unable to cope with the demands placed on them".¹⁶⁹ Further debate about

¹⁶⁶ S. Barodawala, "Care of Older People: Community Care: The Independent Sector", *British Medical Journal* (1996), p. 742.

¹⁶⁷ C. Huxham and S. Vangen, "Working Together: Key Themes in the Management of Relationships Between Public and Non-Profit Organisations", *International Journal of Public Sector Management* **9:7** (1996), p.5.

¹⁶⁸ W. Paxton, et al. *The Voluntary Sector Delivering Public Services: Transfer of Transformation?* (2005), p.3.

¹⁶⁹ B. E. Dollery and J.L. Wallis, *The Political Economy of the Voluntary Sector: a Reappraisal of the Comparative Institutional Advantage of Voluntary Organisations* (2003), p.30.

the historical precedent of a fairly autonomous voluntary sector working on behalf of a passive central 'welfare state' government remains to be explored.

Voluntary service is one of the most distinctive constituents of modern Scottish society. A relatively poorer country in Great Britain, Scotland has retained more traditional methods of ameliorating social problems. Socially-normed principles, including self-help and social responsibility, underscore these practices. The result of a combination of historical processes and welfare state legislation, the Scottish voluntary sector has achieved relative autonomy in the twentieth century. An inherent by-product of such power has been tremendous growth in responsibility for the provision of social services in the community. A vital resource for many older people, the Third Sector is demonstrably an important component of the British Welfare State. However, the Care in the Community agenda has produced its own set of problems. Further to specific questions about the contradictions of a welfare state which fails to play a more active role in the social services, the chronic problem of unequal provision of service and the long-term viability of the voluntary sector must be addressed. In terms of inequality, Scotland's historical preference for parochial management of relief has negatively impeded progress in the centralisation of social service provision. Therefore, a post-code lottery persists in the formal sector. Although older age cohorts in the recent past have generally felt that the voluntary provision of services has been adequate for their needs, it has been suggested that future cohorts will have more expectations.¹⁷⁰ Along these lines, middle-aged and older people in the future may not participate in the voluntary sector to the same extent as those in the past. Upon review, the Scottish voluntary sector is representative of the interplay between informal kinship networks and the formal sector:

¹⁷⁰ *Interview with Pat Boylen, Broughty Ferry 27 August 2004.*

operating as fictive kin, voluntary organisations have functioned as a resource and a particularly Scottish response to social problems in the modern period.

CONCLUSION

The historical examination of the social experience of growing older has shown that public understandings of ageing as a process have demonstrably lagged behind the evolution of personal understandings of what it means to be old. Older people's status has become more ambiguous in society, whereas ageing has become far better understood among older people themselves. It can be argued that this lacuna has reinforced further misunderstandings of the needs of older people. Therefore, in terms of the question as to whose responsibility it is to plan for old age, too often responsibility has been placed upon the individual. Upon further exploration, unequal access to social and economic resources in old age has been perpetuated by policies which fail to address these problems. A review of the themes explored indicates that while many social problems have indeed persisted over the period, older people had greater access to a better quality of life in the final decades of the twentieth century. By retaining cultural practices and adapting to the social demands of modern society, older age cohorts continued to play important roles in their families and their communities.

Older people occupied various statuses in the past. Some of these were based on respect and regard for their social standing. Indeed, specific roles such as the patriarch or the matriarch were filled by the oldest members of the family. However, their place in society was far more ambiguous. This has been interpreted on the basis of demographic trends as well as prevailing ageist attitudes. For the most part, the latter can be considered as the most significant barrier to the progression of old age as an identity in the public sphere. Conversely, older people have undergone a transition, in which more positive outlooks among themselves have emerged. This can be attributed to growth in size of older populations as well as better quality of life. Longer, healthier lives in which individuals had opportunities to make choices resulted in more flexible understandings of

what it meant to be an older person. The persistence of this duality shaped the modern experience of being old: self-concept and the valuation of specific familial roles were contradicted by prevailing negative outlooks of ageing in various sectors of society. It can be argued that this is a central feature of what it meant to be old in the late modern period.

Further analysis of specific family roles in old age drew attention to the evolution of the role of the grandparent. In the nineteenth century, grandparenthood was based on formal exchanges. This can in part be attributed to social networks and housing arrangements. *In loco parentis*, grandparents were often expected to fulfil parenting roles. In families where the grandparent did not occupy parental roles, the quality of relationship grandparents had with their grandchildren was often limited in scope by virtue of infrequent contact. Alternately, the imperative of showing respect to older family members stunted the development of psychologically significant relationships. Furthermore, potentials as grandparents were determined by shorter life courses. Longer lives in the twentieth century coupled by changes in family structure and social mores radically transformed grandparents' experiences. Grandparenting evolved in the twentieth century as a social process in of itself. In addition to undertaking caring responsibilities for their grandchildren, grandparents forged distinct relationships with their grandchildren. Over time, these relationships became far more flexible in nature. Grandchildren's expectations often determined the quality of these contacts: social norms in society tended to favour 'fun' grandparents. Grandparenting represented an active stage of personal fulfilment in the life course. Older people's social roles in their families and as individuals have thus progressed as a response to modernity.

Explanations of older people's status in the family were contextualised by historical interpretations of the Scottish family. In the late modern period, kith and kin uniquely functioned as vital sources of social and economic capital: interdependence

between the generations was facilitated by the reciprocal exchange of resources. Familial obligations were socially normed in Scottish society. These bonds were reinforced by the stresses resulting from mass migration and urbanising processes in the nineteenth century. As an adaptation, matrifocal family networks were established in Scotland's cities. Within these structures, older family members contributed to the household purse, provided informal care, formed significant relationships with other family members, and participated in family gatherings and celebrations. Respectively, younger family members were selected from these networks to provide care for ageing family members. While many families were in intergenerational households throughout the modern period, these housing practices became less prevalent in the twentieth century. Nonetheless, the extended family retained its role as a primary resource for older people. As a response to more recent economic and social trends, families continued to adapt their methodologies. Family infrastructures were thus retained as important resources for older people in the latter decades of the twentieth century. The stabilising effects of the family unit were manifestly important in the community.

A product of historical processes, Scottish communities varied greatly between regions. This process was hastened in the late modern period. Examination of the demographic patterns in this period revealed that in Scottish urban areas, development was uneven. The manner in which cities and burghs progressed in this period was controlled by local industries: a large concentration of Scotland's population specifically migrated to the Central Belt. Drawn by heavy industry, young male migrants flooded into Clydeside in the industrial period; respectively, Dundee was also a magnet because of its textile industries. Edinburgh's service industry and position of comparative wealth resulted in a demand for skilled artisans in addition to labour and domestic service. The nature of industry specifically impacted on the age and gender composition of Scotland's cities. A greater proportion of women lived in Dundee from the mid nineteenth century.

This shaped the dynamics of family networks and the development of community infrastructures which complemented the way of life in Dundee. The economic processes which shaped the social landscape of Scotland's cities over time resulted in the unequal distribution of resources. Inequalities between regions were magnified by class differentials within cities, in which specific neighbourhoods became enclaves for the very wealthy or the poor. Quality of life in such areas was affected by access to local services. The unique characteristics of particular urban areas such as Edinburgh and Dundee determined older people's everyday lives and employment opportunities.

Older people's work patterns in the nineteenth and twentieth centuries were closely aligned to contemporary market trends and economic policies. Viewed over the entire period, it is clear that older workers' status has radically shifted: as essential employees in the nineteenth century, older men and women functioned as less valued employees in most of Scotland's services and industries. Specific employers such as the jute and brewing industries provided examples of qualitatively different statuses as older employees and earners. Jute production was largely a female occupation, and thus employers paid their employees at all age levels less than what males earned in other industries. Hence within the workplace, older women's status was restricted on the basis of their diminished earning power. However, their participation in the labour force and weekly contribution to the family purse provided these women with a specific status in their families and community. Contrastingly, other industries in Scotland valued their older workers to a greater extent. In paternalistic industries such as book publishing and brewing, older employees were employed by virtue of their expertise, and they were relatively well looked after by their employers. Over time, these labour relations became less the norm. In the twentieth century, employment policies were severely constrained by economic trends. As a consequence, older workers were intermittently included and excluded from the labour force, which ultimately denied many older people the right to

work. Functioning as a reserve army of labour, middle-aged and older employees became increasingly redundant as the twentieth century progressed. Ambiguities in status were profoundly affected by mandatory retirement policies, which have been defined as institutional ageism.

The introduction of retirement policies in the post-war period extended the right of retirement to every older citizen in the United Kingdom. This has arguably been the most significant social change among older populations in the late modern period. As a phenomenon, the universal experience of retirement progressed in stages in the post-war period. Initially understood in terms of retiral from work, retirement was a short period of time in most men's life careers. As life expectancy extended in line with improvements in quality of life and better health, the retirement period became longer for both older men and women. Thus retirement emerged as a social benchmark in the life course. In recent theoretical discourse, this has been defined as the Third Age. Because the Third Age was generally a period of life experienced by the middle class and women in the nineteenth century, most contemporary pursuits were selected on the basis of individuals' social aspirations as older people. What is notable about many of their activities was the common practice of engaging in self-improvement, which continued to be pursued in the twentieth century. Intellectual pursuits such as writing biographies and civic engagement in old age were fairly typical among all classes of Scottish society. The choices older people made in their retirement were therefore bound up with their own interests, circumstances, and access to resources. The opportunity to retire in the twentieth century is a feature of the British Welfare State.

Historical analyses of the welfare state in twentieth-century Britain have generally addressed the problem of inadequate pension provision and unequal access to social services. Argued in terms of economic capital, welfare state policies have been critiqued in various contexts. A significant area of discourse has concentrated on the persistent

problem of poverty among older women in modern society. Understood to be a failure of the Beveridge Report, pension policies discriminated against women in particular: shorter work histories and a higher rate of part-time work undertaken to balance caring responsibilities diminished women's rights to a full pension on their own merit. Analyses of lower incomes in old age also addressed the limitations of formal services for older people. However, many of the sources did not include separate studies of the provision of social welfare services in Scotland. Although such services have also been unequally provided in Scotland, they must be contextualised historically. An important aspect of welfare state legislation in the post-war period was the separate proviso for local authorities to provide care in the community. As a Scottish instrument of the welfare state, from 1968 Social Work administered a wide remit of personal services and housing for older people in Scotland. Over time, it was clear that Social Work was unable to provide equivalent services for older people due to the economic constraints of local authorities. Many of the weaknesses of the formal sector have thus been ameliorated in the informal sector.

An extension of the self-help ethos, the Scottish voluntary sector has operated as an important resource for older people throughout the late modern period. In the nineteenth century, the Kirk was the dominant source of relief. The formalisation of poor law policies in 1845 did not disrupt the role that the Church of Scotland would continue to play in the voluntary provision of social welfare for older people. Subsequent growth in secular voluntary organisations thus complemented charitable work conducted in the Kirk. Indeed, various groups cooperated in the early twentieth century to further the political cause for pension reform and to organise local social groups for older members of the community. This may be viewed as an important step toward later models of older people's organisations in the voluntary sector. As a result of economic depression in the interwar period and the imperatives of the Second World War, most

voluntary organisations had limited resources for older people until the post-war period. An outcome of consolidation of national voluntary bodies and the formalisation of voluntary organisations in welfare state legislation, the 'Third Sector' became an important tool in the provision of informal care in the community. In this period, national organisations such as Age Concern were founded. A social history of Age Concern Scotland has shown that as a comparatively flexible source of social welfare, voluntary service addressed the needs of older people and their families within the community.

A review of the historical processes shaping the individual and group experience of older Scots in the late modern period indicates that various areas of research can be further explored. By its very nature, a broad approach provides general arguments and historical context for the social processes of ageing. Furthermore, the protracted period of time under study demanded a thematic approach to the various social and economic trends over the time frame 1845-1999. Given the multi-disciplinary approach to the subject, specific themes can be isolated to conduct further research within a narrower scope. For example, research on older people and their families could be developed into a social history of the family in late modern Scotland. Similarly, case studies of Age Concern Scotland can be incorporated into a larger study of the Scottish voluntary sector in the twentieth century. In this vein, the history of Social Work needs to be told. Further to following up particular themes would be more in-depth employment of original sources to develop an historical narrative of ageing using a biographical approach; of particular interest would be the use of autobiographies and oral histories as methodologies. As an original body of research, the work as it stands contributes to Scottish historiography by being the first to incorporate the history of older people in Scotland.

The intellectual marginalisation of the subject of old age as a social process has resulted in the perpetuation of inaccurate assessments of the specific needs of older populations in the late modern period. Misunderstandings of the experiences of older people in Scotland in particular have been reinforced by the general lack of contemporary scholarly analysis and judgment of past and present social policies. The imperative of developing a body of Scottish old age literature is clear. Recent economic and demographic trends in Scotland have raised questions as to the impact of an ageing population and a diminishing younger labour force. Over-reliance on the voluntary sector as a social welfare resource for older populations will soon need to be resolved. Furthermore, the provision of 'free' care in devolved Scotland has already raised concerns about the viability of such policies in the long term. The future of social policies in the Scottish Executive must incorporate a more rigorous examination of social and economic processes from the past if society is to avoid visiting the sins of the fathers on succeeding generations of the elderly.

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Register of Accidents. 1896-1935. Sidlaw Industries Ltd (J and A.D. Grimond Ltd.) [MS 66/IV/7/1]

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Background Information pertaining to Robert Younger [Breweries Research Files]

Accident Book Robert Younger Ltd (1948-1949) [RY 8/5/2]

Accident Book Robert Younger Ltd. (1937-1948) [RY 8/5/1]

Correspondence and Papers Concerning Employees (1960) [TJB 8/1/1/3]

History of Drybrough [DRY 12/5/2]

Letter Book #2 Private Drybrough & Co. [DRY 3/1/1]

McMaster, Charles. "History of Brewing" c.1985 [Box 6 Research File]

Papers and Correspondence (1960) [TJB 8/4/2]

Pension and Life Assurance Schemes George Younger & Son Ltd [GY 8/4/1-4]

Pension and Life Assurance Scheme George Younger & Son Ltd [GY 8/4/2]

Pension and Life Assurance Schemes George Younger & Son Ltd [GY 8/4/4]

Photograph Collection (1914) [RY 14/1/-69]

Photograph of “Father William” [Box 4]

Private Correspondence William Younger (1884-1900) [WY 5/9/1]

Private Minutes William McEwan & Co Ltd (1918-1959) [SNM1/6/2/1]

Register of Disabled Workers and Staff Pension Scheme [TJB 8/4/1]

Reminiscences of William Younger [Breweries Research Files]

Salaries Book Thomas and James Bernard Brewers (1889-1914) [TJB 8/3/1/1]

Salaries Book William Younger and Co Ltd (1928-1931) [WY 12/2/4]

Salaries Book William Younger and Co Ltd. (1938-1940) [WY 12/2/5]

Staff Pension Scheme Drybrough and Co Ltd. (1965) [DRY 8/4/1]

Staff Pension Scheme Thomas and James Bernard Ltd. (1947) [TJB 8/4/2]

Wages Book Robert Younger Ltd (1956-1959) [RY 8/3/1]

Wages Books William McEwan & Co Ltd. (1896-1900/1901-1913) [SNM8/3/2/13-14]

Younger Family History [RY 15/1/2]

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Garnett, Thomas. *Observations on a Tour Through the Highlands and Part of the Western Isles of Scotland* (1800) [MU 8 – Y 16]

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Manuscript Anicula (Willa Muir) “This Lopsided World” [MS 38466/2/8]

Photographs

II. Oral History Interviews, 2004

Danny Akin	1 June 2004
Maria Anderson	10 August 2004
Mary Andrews	1 June 2004
Bob Barks	10 May 2004
Pat Boylen	27 August 2004
Irene Brown	24 May 2004
Jackie Brown	1 June 2004
Ethel Buglass	28 May 2004
Betty Bushnell	8 March 2005
Muriel Cameron	24 May 2004
Elizabeth Collier	25 May 2004
Violet Duncan	10 May 2004
John Roderick Durst	10 September 2004 and 11 May 2005
Mr Forsyth	26 May 2004
Lucinda Fox	15 June and 14 July 2004
Jane Gailey	25 May 2004
Mrs C.C.Gouldsbrough	27 May 2004
Mrs Hall	1 June 2004
Janette Jamieson	28 May 2004
Kay King	19 May 2004
Elizabeth Knopp	5 July 2004
Margaret Lawrence	10 August 2004
Anne MacDougall	10 September 2004 and 26 February 2005
Nancy MacLeod	8 March 2005
Jessie Malcolm	5 May 2004

Ronaldo Massimo	27 May 2004
Catherine Mein	29 April and 15 June 2004
Miss Melrose	28 May 2004
Jane Miller	25 May 2004
Margaret Myles	25 May 2004
William O'Shaughnessy	8 July 2004
James Orr	26 May 2004
Bet Park	4 June and 27 August 2004
Rose Pike	10 August 2004
John Rice	20 July 2004
Elizabeth Ross	26 May 2004
Stella Roxburghe	26 May 2004
Isobel Rynd	4 June 2004
Winifred Staddon	28 May 2004
Mary Smith	5 July 2004
Sheila Thomson	26 May 2004
Betty Watson	5 May 2004
Diana Wilke	13 July 2004 and 6 February 2005
May Williamson	1 June 2004
Margaret Webb	4 June 2004
Ron	15 July 2004
Ruby	30 August 2004
Sarah Lynn	30 August 2004
Winnie	8 July 2004

N.B. For purposes of privacy and data protection, these pseudonyms have been used in place of individuals' actual names in the body of the thesis.

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Alzheimer Scotland	www.alzscot.org
The Association of Friendly Societies	www.afs.org.uk
British Broadcasting Corporation	www.bbc.co.uk
Centre for Policy on Ageing	www.cpa.org.uk
Department of Work and Pensions	www.dwp.gov.uk
Dundee City Council	www.dundeeccity.gov.uk
Help the Aged	www.helptheaged.org.uk
Housing Care	www.housingcare.org
Margaret Thatcher Foundation	www.margaretthatcher.org
Office of the Third Sector	www.cabinetoffice.gov.uk/third_sector
Oral History Society	www.oralhistory.org.uk
National Statistics	www.statistics.gov.uk
Parliamentary Publications and Archives	www.parliament.uk
Punch Magazine	www.punch.co.uk
Scottish Executive	www.scotland.gov.uk
Scottish Studies Foundation	www.electricscotland.com
Scottish Trades Union Congress	www.stuc.org.uk
Seniors Network	www.seniorsnetwork.co.uk
Trades Union Congress	www.tuc.org.uk
University of the Third Age	www.u3a.org.uk
Workhouses	http://users.ox.ac.uk

These sites are for health statistics in general and include references to UK mortality statistics:

Datasets for Humanities and Social Sciences	www.data-archive.ac.uk
Department of Health	www.doh.gov.uk/public/stats1.htm
Royal College of General Practitioners	www.rcgp.org.uk
World Health Organisation	www.who.org