

EXPERIENCES OF AGING AND THE ROLE OF PERSONAL RELATIONSHIPS  
IN CHILEAN SOCIETY:  
PERSONAL COMMUNITIES, SOCIAL CAPITAL AND POLICY CONTEXT

by

MARÍA-JOSÉ TORREJÓN CARVACHO

B.A., Universidad de Chile, 2005

M.A., Universidad de Chile, 2007

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## **Abstract**

The rapid process of population aging and the effect of an induced process of modernization since the early 1980's in Chile have prompted questions about the quantity and quality of older people's formal and informal networks of support. Socio-cultural changes reflecting values of an individualized society put into question the mandatory character of traditional family support. Using a conceptual framework that combines a focus on bonding and bridging social capital, on personal communities and that employs a narrative approach to policy analysis, this thesis investigates to what extent and under which circumstances older people living in an urban area exchange help and complement family resources with other types of personal ties (e.g. friends, neighbours, and/or state organizations). Paying particular attention to the composition, function and meaning of personal ties in later life, I draw on 40 in-depth interviews with people between 60 and 74 years old living in the city of Santiago and analyze the Chilean "Integral Policy for Positive Aging 2012-2025" to answer this research question. The findings show how older people become integrated in society through the management of a network of diverse personal ties. They highlight the nuances in the meaning and function of these ties in a context of low institutional trust and neoliberal social policies. The research contributes to existing literature by: a) clearly differentiating bonding from strong ties, and bridging from weak ties, while stressing the role of bonding ties acting as bridging social capital to connect the older person to key symbolic and practical resources in a context of low trust; b) offering a conceptual and methodological framework to recognize the normative and cultural aspects of social policies on aging; c) explicitly considering the role of the socio-cultural context of a country of the global south in the creation of personal communities.

## **Preface**

This dissertation is an original intellectual product of the author, M.J. Torrejon. The fieldwork reported in Chapters 2-4 was covered by UBC Ethics Certificate number H13-02487.

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## **Dedication**

Dedicated to the memory of my father Fernando Torrejon (1951-2012).

## **1. Introduction**

The thesis examines the personal networks of Chilean older people, paying particular attention to the composition, functions and meaning of older people's relationships in the context of a society experiencing a rapid process of population aging and the effects of structural and cultural changes triggered since the dictatorship period. In this context, we can frame the way in which older people manage and signify the ties that form their personal networks as representing a push and pull between the values associated with an individualized society, the low levels of institutional and social trust that characterize Chilean society, and the need to depend on the support provided by their personal ties due to the limitations of neoliberal policies and services directed to older people. The thesis is composed of three result chapters (chapters 2, 3, and 4), written in the format of self-contained papers, and a conclusion chapter (chapter 5). The conclusion chapter connects the results with the overarching issues regarding socio-cultural change in Chile presented in this introduction chapter (chapter 1). Three central issues are examined from different angles in the finding chapters, based on the analysis of 40 interviews conducted with Chilean men and women between 60 and 74 years of age. These issues were: (1) the function and composition of older people's personal networks; (2) the circumstances under which older people exchange diverse kinds of help with different ties; and (3) the meaning of personal relationships in later life.

## 1.1. Background

In 2008, 62% of the world population aged 65 and over were living in developing regions, and it is expected that this proportion will increase to 71% by 2030 (Higo & Williamson, 2011). Chile is an example of this phenomenon as its older population is the age group that is most rapidly increasing. Today Chileans live an average of 79 years, which is more than 20 years longer than the average in 1960. At the same time, the birth rate has decreased from 5.4 children per woman in 1962-1963 (INE, 2006), to 1.8 in 2012 (Comite Nacional de Estadísticas Vitales, 2012). According to the last Census conducted in 2012, Chileans aged 60 and older constituted 13.7% of the population (Comite Nacional de Estadísticas Vitales, 2012). The projections indicate that this proportion will reach 28.2% in 2050 (INE, 2003).

Traditionally in Chile, family more than any other type of relationship, has had the responsibility for elderly people care (Lubben & Gironde, 2003). However, demographic trends, along with the insufficient capacities of Chilean public institutions to meet the demands of an aging population (Murad, 2003), have opened discussions about the availability of informal support in later life. The central concern is that the future cohorts of older people will face a shortage of support and care networks due to changes in family structures and living arrangements, and in cultural values protecting older family members. Regarding changes in family structure and living arrangement, the available data show that the number of older people in Chile who are living alone or with another older person has increased while the household size has decreased. Chilean census data show that older

people living only with a partner increased from 15% in 1992 to 18% in 2002 (Herrera & Kornfeld, 2008). In addition, more recent data from the National Socio-economic Survey (CASEN) reveals that the number of older people living alone has increased from 10% in 1990 to 14% in 2011 (Ministerio de Desarrollo Social, 2011). Also, the average number of people living in the same household has decreased steadily in the last fifty years. While in 1960 this proportion was 5.4 and 5.0 in 1970, in 2012 it was 2.9 people per household.

Another argument indicates that the shift from “familistic” to “voluntaristic” values may be putting at risk the networks of solidarity among family members (Fine, 2006; van Tilburg & Thomése, 2010). Familistic values are related to traditional norms of parental responsibility and filial obligation or “mandate” (Oddone, 2009), and thus to the expectation in both parents and children of exchanging support if needed. Voluntaristic values, on the other hand, are characteristic of societies experiencing processes of individualization. In these societies, people reflexively pursue relationships that are in agreement with their expected individual biographies (McDaniel & Gazso, 2014), as people negotiate their personal relationships guided more by values of personal fulfilment than by taken for granted moral mandates. Thus, the exchange of help among family members is not based on traditional rules of family obligation, but instead is negotiated and guided by personal choice. The main concern regarding older people’s social capital is that this greater freedom of choice will decrease the reliability and the capacity of the personal network to provide support to older family members. The assumption is that traditional social structures and communities fulfilled a protective role toward individuals (van Tilburg & Thomése, 2010).

## 1.2. Personal relationships in context

Population aging in post-industrial societies is a particularly complex phenomenon of analysis, since it represents a context in which key social transformations intersect (Osorio, 2006). For the particular topic of social capital in late life, we cannot forget that personal relationships are dynamic and depend on particular trajectories marked by social, cultural, and historical forces. Social relationships are developed, maintained, modified, and ended by individuals acting in specific contexts (Adams & Allan, 1999).

The coup d'état of 1973 marked in Chile the beginning of major changes in society. The authoritarian state implemented a neoliberal approach to develop an open model of participation in the global market. The new model was based on market competition led by the private sector (Torche & Wormald, 2004) while, at the same time, the role of the state in socially focused public policies, welfare programs, and service provision was reduced (Menanteau-Horta, 2006). According to Taylor (2003), the nature of the relation between state and society was redefined through individualization, privatization and decentralization. As a result, health provision, education, the pension system, and public industries were privatized. In addition, the instruments for political representation were suppressed and the problems of citizens were to be solved individually through market mechanisms (Espinoza, Barozet, & Méndez, 2013).

The first phase of implementation of the new model was marked by a *shock treatment* (Collins, 1995) for the liberalization of Chilean economy. During this period the unemployment rate increased along with the number of people living in precarious

conditions. According to Menanteau-Horta (2006), almost 2 million people (one fifth of Chilean population), were affected. As a result, by the financial crisis of 1982, Chilean citizens were not only politically but also economically debilitated. During the second phase of implementation, a more realistic approach was applied and some adjustments were made to the model, but the market was still expected to play a central role in social assistance. By the time democracy returned in 1990, the macroeconomic landscape had positively changed and a new period of sustained growth with low inflation had begun (Portes, 1997). However, the rapid implementation of an imposed neoliberal model produced winners and losers (Torche & Wormald, 2007), visible today in the levels of social inequality.

Many authors have described the cultural changes resulting from the implementation of the new model and its modernizing objectives (Garretón, 2004; Lechner, 1999; UNDP, 1998). The findings of the Human Development Reports of 1996 and 1998 are good examples of these changes. According to these reports, there is discontent caused by the rapid transformations that affected people's daily lives, their forms of sociability (family and community), their values, and identities (UNDP, 1998). Based on the concept of *human security*<sup>1</sup>, the report of 1998, titled "The Paradoxes of Modernization", examined objective and subjective conditions that enable people to access the opportunities created by the modernization of the country. According to the findings of the Subjective Human Security

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<sup>1</sup>"Human security means protecting fundamental freedoms – freedoms that are the essence of life. It means protecting people from critical (severe) and pervasive (widespread) threats and situations. It means using processes that build on people's strengths and aspirations. It means creating political, social, environmental, economic, military and cultural systems that together give people the building blocks of survival, livelihood and dignity" (CHS, 2003, p. 4).

Index<sup>2</sup>, the national average score was low (0.33), with a majority of the responses categorized as low (35%) and medium-low (45%) subjective security. These findings, along with the results of in-depth interviews and life history interviews, were interpreted in the report as an indicator of social dissatisfaction, which was translated in Chileans' perceptions as insecurity and uncertainty. The report does not include standard measures of trust, such as the ones included in the World Values Survey. However, the research evaluated 'sociability' examining four aspects that connect with social trust, where interviewees could agree, disagree or say they do not agree or disagree. The four aspects were: people respect others' opinions (53% disagree, 28% agreed), it is difficult that others do something for other people without expecting something in return (64% agreed, 23% disagreed), people push their way over you to achieve their goals (76% agreed, 10% disagreed), and it's easy to make good friends (53.8% agreed, 28% disagreed). The authors of the report supported their findings citing a study conducted by the Catholic University of Chile in 1995, which showed that only 8% of the interviewees from different cities of Chile indicated they could trust in the majority of people. Taking all this information into consideration, we can see that it is mainly the anonymous other who cannot be trusted. The report concluded that the overall results indicated a weak definition of "Us", which implies a lack of trust in others, a weak sense of belonging, and a feeling of uncertainty. In other words, the report showed a weakening of the social fabric and the traditional forms of representation.

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<sup>2</sup> The index goes from 0 (low human security) to 1 (high human security). The variables included in the construction of the index are: sociability (possibility of receiving help from others), retirement, work, information, health, and security (delinquency).

Lechner (1999) interprets the findings of the aforementioned report as indicating a 'cultural gap' between individuals' experiences and socio-cultural structures produced by the rapid modernization process:

[... ] in Chile occurs a deep restructuring in only ten, fifteen years, that makes people's practical experiences and mental dispositions obsolete. The dissatisfaction would reflect the bewilderment of people who are suddenly thrown into an unknown world (Lechner, 1999, p. 2).

There was no time for people to develop proper tools to act in this new context, where the state was no longer the main source of social integration. Thus, the Chilean modernization processes and the experience of a military dictatorship negatively affected social relationships and trust among people and towards Chilean institutions (Lechner, 1999). The latter is made clear by Valenzuela and Cousiño (2000) when comparing levels of social trust of Chile and United States. The 42% of people in US who believed that they could trust in people contrasted with the 14% of Chilean people answering positively to this question. This contrast was also visible in the 86% of Chileans and 54% of United State respondents who agreed with the statement "you can't be too careful in dealing with people".

Today, the level of trust in Chile continues to be low, being among the 30% of countries in the world with the lowest social trust. The World Value Survey showed that in 2011 only 12% of Chileans believed that "most people can be trusted" and 70% believed that they cannot be too careful in dealing with people. In addition, the Bicentennial Survey indicated that in only eight years (2006-2014) institutional trust diminished, with political parties and the parliament being the least trusted institutions, with only 3% of people stating they trust much or very much in them (Santander & Centro UC Políticas Públicas, 2005). In

this context of low social and institutional trust, we can ask to what extent and why would older people be willing to invest in relationships outside their close family circle to exchange different forms of emotional and practical support, and what is taken into consideration when the older person decides asking and/or accepting help from family and non-family ties?

### **1.3. Conceptual framework**

To say that individuals have greater freedom of choice does not necessarily imply negative consequences for older people's social capital, but rather a change of scenario. In this new scenario, late life has been described as a stage of risk and choice, where changes in the inter- and intra-generational contract, at the level of family and society in general, can represent an opportunity to reconstruct the fragmented pathways of late life (Phillipson, 2013). In this regard, older individuals can actively create their own modes of living (Morgan, 1996). That personal ties can be developed based on voluntariness also means that older people can invest in relationships outside their nuclear family. From this standpoint, for instance, the instrumental and emotional help required by older people could be sought also in friendship relations and weak ties (Granovetter, 1973), such as casual acquaintances and neighbours. Nonetheless, the particular Chilean context, characterized by low levels of trust, makes us wonder to what extent people would invest in relationships beyond their close family circle, and if they do so, why? Two variants of the theory of individualization (described below) are used as an overarching framework to examine the composition, function, and meaning of older people's personal relationships in the Chilean context.

In Chile, renowned scholars have argued that families and community life are being affected by individualization (Güell, 1999; Lechner, 1999; PNUD, 2004; Valdés, 2007). However, this has been done more as a reflective exercise than an empirical inquiry. Therefore, it is unknown how individualization has actually affected older people's social capital.

The theory of individualization states that the individual has become the central unit of social life, transforming human identity into a personal task as actors are charged with both the responsibility for performing that task and the consequences of their performance (Bauman, 2002, p. xv). Below, I explain first the more traditional perspective of the theory of individualization, usually applied to describe European societies. Then, I present a more critical strand of this theory, commonly used to describe the effects of individualization in developing countries. Both variants of the theory of individualization enable us questioning to what extent family roles have broken down, changed, or strengthened, as well as recognizing different types of ties that can be relevant in late life.

### **1.3.1. Traditional perspective of the theory of individualization**

The decreased importance of traditional institutions and value systems in modern societies, or risk societies, as some authors have stated, has also resulted in greater uncertainty. In this context, Beck and Beck-Gernsheim (2002) stress the relevant role of family (in its traditional and emergent forms) in modern society, "It will be an alliance between individuals as it has always been, and it will be glorified because it represents a sort of refuge in the chilly environment of our affluent, impersonal, uncertain society" (Beck &

Beck-Gernsheim, 1995, p. 2). Modern forms of family would work then in a more symbolic level, constituting today's way for individuals to be "re-embedded into social life" (Fine, 2007: 185) through a sense of certainty, continuity, and belonging. Therefore, family role, far from being at risk, might have changed or perhaps it has been even strengthened. In the same way, we can consider that a greater freedom of choice can broaden older people's circle of sociability and support.

### **1.3.2. Critical perspective of the theory of individualization**

Personal ties are embedded in historical, cultural, and societal contexts. The structural context shapes and gives meaning to the different ties that form older people's social capital even in the context of an individualized society. To say that in individualized societies the individual has become the central unit of social life does not mean that individuals are freer. According to Araujo and Martuccelli (2014, p. 26) "individuals are required and produced by a sum of institutions that oblige them to develop a personal biography". In the same way, Beck indicates that individuals must give biographical solutions to systemic contradictions, but these solutions are shaped by institutional prescriptions (Araujo & Martuccelli, 2014; Beck, 1992b). On this regard, the complex social, governance, public service and policy context of Chile shape older people's social capital. The rhetoric of individualization encourages people to construct their own biography and to connect with people based on their own personal motivations, while at the structural level people are left to their own devices to get support in the context of a reduced welfare state. In such a context –also characterized by low levels of trust–, we might be inclined to think that older people will mainly depend on family support.

Critical approaches based on the theory of individualization have been developed by authors analyzing non-European contexts. These approaches put a particular emphasis in the fact that individuals negotiate their biographies with the opportunities and constraints provided by the social context in which they are embedded, which result in different forms of individualization depending on the country or the group under analysis. Through the concept of 'fourth world' Castells (2010, p. 73) analyzes diverse forms of social inequality and processes of exclusion that generate groups (e.g. unskilled workers, ghetto dwellers, people from underdeveloped countries) unable to keep up with the rapid pace of informational change. Individuals from the 'fourth world' would not be able to pursue individualized and flexible life planning due to the structural exclusion they face. In a similar fashion, the Chilean sociologist Fernando Robles (2000) makes a distinction between developed and developing countries in the way in which they experience the process of individualization. According to Robles, developing countries have weaker public and private institutions to support the social inclusion of their citizens. In addition, public services and social policies follow a neoliberal logic of individual responsibility, so that individuals must seek help from family, peers and other informal ties to be included into society. As Brodie (2007, p. 103) indicates:

Individualization is increasingly embedded in strategies for social policy reform, which both promote the illusion of choice and are designed to shape citizens into self-sufficient market actors who provide for their needs and those of their families.

The theory of individualization offers interesting areas of inquiry to observe and better understand changes at the level of personal relationships in a context of population aging. The issue under analysis in this thesis is not only whether the traditional nuclear family is still the predominant form of association and the main source of support, but most

importantly whether new meanings and functions emerge for this and other forms of association (e.g. friends, fictive kinship, interest-specific organizations). The study explores:

- *To what extent and under which circumstances do older people exchange help and complement family resources with other types of personal ties (e.g. friend, neighbors and/or state) in a context experiencing a rapid process of population aging and profound socio-cultural changes?*

Through this question, the thesis identifies resources embedded in the network of relationships, describing instrumental as well as affective functions including subtle meanings of personal ties. With this in mind, the chapters that form this thesis use complementary conceptual frameworks that enable us to observe older people's personal networks from different perspectives. Below, I will briefly describe the three conceptual frameworks: personal communities, social capital, and narrative policy analysis. These frameworks helped guide the interview schedule and the operationalization of the research question.

### **1.3.3. Personal communities**

Wellman (2001) states that community has become embedded in social networks and it is no longer easily observed in specific groups and public spaces (e.g. neighbourhood). From this perspective emerges the concept of personal communities defined as "networks of sociability, support, and identity, where each person is at the Ptolemaic center of his/her own universe" (Wellman, Wong, Tindall, & Nazer, 1997, p. 28). Research conducted by Pahl and Spencer (2004, 2010; Spencer & Pahl, 2006) also have been based on this notion, capturing the voluntaristic elements of developing and maintaining personal relationships in

the context of individualized societies (Phillipson, 2013). Spencer and Pahl (2006, p. 45)

define the concept of personal community as:

... a specific subset of people's informal social relationships –those who are important to them at the time, rather than all the people they know no matter how tenuous the connection. Consequently, personal communities represent people's significant personal relationships and include bonds which give both structure and meaning to their lives.

The personal community approach developed by these authors gives particular attention to the content of the relationships (Pahl & Spencer, 2004; Spencer & Pahl, 2006) and the way by which people give meaning to such relationships. Personal communities are defined as “communities in the mind” (Spencer & Pahl, 2006), as they are not geographically bounded nor directly observed in an identifiable social grouping, such as a specific club or neighbourhood. In this regard, advancements in communication technologies have been central for the creation and maintenance of these communities. The framework to analyze personal community is the recognition of people who are or were important in the person's life (Chua, Madej, & Wellman, 2009b; Spencer & Pahl, 2006). In this manner, the concept of personal communities is very appealing in its ability to recognize and understand the array of people with whom older persons relate and the underlying motivations to create and maintain these relationships. The analysis of older people's personal communities enable us to consider the interplay of different types of social ties, while recognizing that people act as managers of their networks of relationships (Phillipson, 2013).

#### **1.3.4. Social capital**

From an individual approach, social capital can be defined as “the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance or recognition” (Bourdieu, 1986, p. 248). This definition focuses on the instrumental features of social capital (Portes, 1998), as the network of relationships is the result of individual or collective investment strategies that allow accumulation of profits. Although such investment is not necessarily a conscious and calculated process, this approach does help us to understand personal ties in late life as a network of relationships actively managed by the older person.

A sometimes considered complementary approach to the individual perspective of social capital is the one developed by Putnam who defines social capital as a public good. From this perspective, social capital is defined as “features of social organizations such as networks, norms, and social trust that facilitate coordination and cooperation for mutual benefit” (Putnam, 1995, p. 2). Whether trust can be used as a measurement of social capital is a contested issue and it is not within the scope of this thesis to solve it. However, trust in others is recognized here as facilitating the development of relationships that can potentially become sources of information and support. The consideration of trust in others is central to understanding the role of personal relationships in the Chilean context. Today, Chile is among the 30% of countries in the world with the lowest social trust<sup>3</sup>.

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<sup>3</sup> As a reference to understand the issues of generalized trust in Chile, though for the general population, Chile has a trust index score of 34.4, while Canada scores 85.9<sup>3</sup> (ASEP/JDS, 2009).

From the perspective previously described, the distinction between “bonding” and “bridging” social capital has been established. Bonding social capital refers to inward-looking connections that “tend to reinforce exclusive identities and homogeneous groups” (Putnam, 2000: 22). This type of social capital reinforces exclusive identity and tight bonds of solidarity, trust and reciprocity (M. Leonard, 2004; Phillipson, Allan, & Morgan, 2004). “Bridging” social capital, on the other hand, is “outward looking and encompass[es] people across diverse social cleavages”(Putnam, 2000, p. 22). While bonding social capital is beneficial for “getting by”, “bridging” social capital is central for “getting ahead” (de Souza Briggs, 2003; Putnam, 2000) as it links to external assets and information. The distinction between bridging and bonding properties of personal relationships is particularly interesting to study the ways in which older people manage their personal ties in a context of low social and institutional trust. In such a context, we may expect that personal relationships in late life (e.g. children and friends) are central to access specific resources and information, whether they can be described as bonding or bridging social capital is an issue to be explored in this thesis.

The distinction between bonding and bridging social capital is relevant as the bridging and bonding properties of a tie might be different in late life and in the context of a society experiencing a process of individualization. For instance, ties usually described in the literature as bonding social (based on criteria of similarity between the person and the members of the network of relationships), can be relevant in late life for their bridging qualities. That could be the case of children who can help their parents to connect with younger generations and specific information or services that cannot be easily accessible

after retirement. In the same way, friends can act as bridges as they connect the older person with information and activities that cannot be facilitated by family members. In the context of an individualized society, these bridging properties of ties are specially relevant for more symbolic ways of social integration. As Phillipson (2003) states, bridging social capital helps to generate broader identities and reciprocities and can be crucial to deal with life transitions (e.g. divorce, widowhood) and to engage with new lifestyles in late life. In a similar vein, de Souza Briggs (2003, p. 2) indicates that bridging ties constitute bridges across roles, symbolic interests, and worldviews, being important to develop broader identities and communities of interest (de Souza Briggs, 2003; Putnam, 2000).

#### **1.3.5. Narrative policy analysis**

A narrative approach to public policies defines policies as a meaning frame that influences individuals' interpretations and practices. Biggs and Powell (2003, p. 116) state: "policies provide narrative templates within which certain categories of person or groups are encouraged to live out their lives". In that sense, the issue is not only whether policy definitions and action identify and foster emergent population trends but, more importantly, how policies legitimate certain identities by creating social spaces and providing the materials for the enactment of those identities.

According to Clark (1993, p. 13), public policy can be defined as the "...attempt to balance competing notions of the responsibility of individuals, families, and the state in developing programs to meet human needs". The author argues that every policy perspective, statement or recommendation represents a story or sub-story within the

broader narrative discourse about a gripping policy problem (Clark, 2011, p. 84). For instance, public policy reflects assumptions on the responsibility of different actors in meeting the needs that have been defined. In the context of our study, a narrative analysis of the current Chilean policy of aging allows us to examine the state's particular definitions and priorities of the challenges of an aging society and the role of different actors (public, private, families, and individuals) in facing those challenges.

An analysis of the Chilean Policy seems relevant to recognize whether this policy provides the social spaces and materials for the current ways in which older people get support and manage their personal relationships. Also, current Chilean Policy, through its different programs and regulations, can legitimate and foster certain forms of social integration that may or may not be in line with definitions, expectations and practices relative to personal relationships and social integration of older people. Social integration can be defined as older people's network of social connections and participation in meaningful roles (Pillemer, 2000, p. 8). We may ask to what extent Chilean Policy identifies and promotes meaningful ways of integration through informal relationships (Scharf, 1998), such as family and friendship networks.

The next section provides a general overview of the methods used to produce and analyze the data. More detailed information on these topics is provided later in each of the chapters that form the findings section.

#### **1.4. Data production and analysis**

Between November of 2013 and February of 2014 forty in-depth qualitative interviews were conducted with a group of urban people between 60 and 74 years old living in city of Santiago, Chile. The research study applied principles of 'grounded theory' in the creation of the interview schedule, the sampling strategy, and the analysis of the interviews. Grounded theory can be defined as an inductive methodology for the construction of theoretical constructs from qualitative analysis (Corbin & Strauss, 2008). A central issue in studies using grounded theory principles is the construction of concepts through an iterative process of data analysis. The purpose of these concepts is to explain people's experiences through the recognition of the context in which those experiences are situated (Corbin & Strauss, 2008). The concepts are constructed through the constant comparative method.

The 'constant comparative method' of analysis was used from the beginning of the study. This is an iterative method that enables the researcher to make decisions regarding initial data production based on the new information that becomes available in the course of the field work (Charmaz, 2006; Corbin & Strauss, 2008). Through the constant comparative method the researcher compares the different pieces of data seeking similarities and differences to classify similar incidents in categories (Corbin & Strauss, 2008). Glasser and Strauss (1967, p. 105) distinguish four stages of the constant comparative method: "(1) comparing incidents applicable to each category, (2) integrating categories and their properties, (3) delimiting the theory, and (4) writing the theory".

It is the iterative qualities of grounded theory that were particularly relevant in the present study, as its principles enabled modifications as more knowledge was gained regarding older people's relationships in the particular context where the study was conducted. The possibility of making changes as the study was developed was central to improving the interview schedule to make it more aligned with Chilean older people's experiences, and to explore other characteristics of the participants that could be influencing the way they managed their personal ties (e.g. include more 'emergent' types of relationships such as living apart together, and recently divorced participants).

Two different stages for selecting the study participants were used. The participants were initially selected from a cohort of older people who participated in a series of focus groups conducted by the Domeyko Program on Aging of the University of Chile in 2008. Only participants who were currently within the age range of 60 to 75 years were contacted. Because the Domeyko study was in 2008, people aged 60 to 65 years old were missing from the sample pool. Also, some eligible participants could not be contacted due to change in their phone numbers. Other people could not participate due to health problems. In addition, a relatively balanced number of men and women was desirable to compose the sample but the list of eligible people from the Domeyko participants had a lower representation of men (40 women and 15 men). In total, 10 people (7 women and 3 men) out of 41 people from the Domeyko study who gave consent to be reached for future studies were contacted and could participate. The other thirty participants were reached in a second

stage through older people’s clubs and associations<sup>4</sup> and by the snowball technique. For the latter strategy, men and women in clubs and associations were asked to refer relatives, friends or acquaintances who could participate in the study. They were asked to refer people who do not necessarily participate in seniors clubs. The use of this sampling strategy was intended to reach people, particularly men, who did not participate in clubs and older people’s associations. The different sampling strategies produced a heterogeneous group of participants with respect to their marital status and living arrangements (Table 1).

**Table 1: Participants demographics**

		Men		Women	
		n	%	n	%
<b>Age</b>	60-66	6	43	14	54
	67-75	8	57	12	46
<b>Marital Status</b>	Married <sup>5</sup>	11	79	9	35
	Divorced/separated/annulled	2	14	7	27
	Widowed	1	7	6	23
	Single	0	0	4	15
<b>Number of Children</b>	0	0	0	2	8
	1	2	14	4	15
	2-3	11	79	16	62
	4-5	1	7	4	15
<b>Living arrangements</b>	Study participant living alone	1	7	5	19
	Study participant without spouse living with children. Study participant is the household head	1	7	8	31
	Study participant without spouse living with children. A child is the household head	0	0	3	12
	Study participant living only with spouse/partner	4	29	4	15
	Study participant with spouse living with children. Study participant or spouse is the household head	8	57	3	12
	Study participant with spouse living with children. A child is the household head	1	7	1	4
	Other	0	0	2	8
<b>Educational level (last level completed)</b>	Elementary school incomplete	0	0	1	4
	Elementary school	0	0	3	12
	High school	3	21	8	31
	Technical education	4	29	1	4
	University	7	50	9	35

<sup>4</sup> People were contacted from a retired teachers club and municipal associations for older adults.

<sup>5</sup> Only 2 dyads of married couples participated in the study.

However, despite the efforts to have a varied sample, more women than men participated in the study. Also, the study participants presented higher than average educational level when compared with Chilean older population (60 years and more). Finally, the experiences described in this thesis represent the particular reality of urban older people, as all the study participants lived in Santiago, the capital of Chile, where 40% of Chilean population lives according to Census data from 2002.

Gender and cohort criteria were important for the sampling strategy and the process of analysis. Gender was central as personal relationships of men and women are differently structured. As in other countries, marital status varies by age and gender in Chile. Women have longer life expectancy than men and their average age at marriage is lower than that of men. While widowers tend to remarry, widowed women tend to remain single. This also creates cohort differences, as being alone and widowed becomes more common among older women than men. Chilean data for the population of 60 years of age and more show that 35.1% of older women are widowed versus 12.3% of men. There are also more single older women (11.6%) than older men (6.2%) (Gobierno de Chile, 2012).

Differences between cohorts and gender are also important because of the life transitions experienced by Chilean older people. In the case of the younger cohort of older people (60-66 years of age) considered in this study, people have recently retired or are in the process of retirement<sup>6</sup>. In addition, studies on personal relationships in late life have shown that women receive more help from and have better relationships with friends and family members than men (Cornwell, Laumann, & Schumm, 2008; Tomassini & Glaser, 2007).

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<sup>6</sup> The retirement age in Chile is 60 years old for women and 65 years old for men.

In Chile, there is little information on this regard, but a qualitative study conducted by Barros (1991) showed that older men give more importance to family relations, while older women give similar importance to friends and family ties.

This research focuses on a cohort of older people in the earlier stages of aging, those from age 60-76 years, which was divided in two sub-cohorts: people between 60 to 66 years old and those between 67 and 75 years old. The rationale for this distinction is that the younger cohort includes the baby boomers, a cohort that has not yet been studied in Chile. In addition, due to the dictatorship period, Chilean people experienced drastic changes in their personal relationships as well as the institutional context in which such relationships were developed and enacted. In 1973, the younger cohort of older people was at the beginning of their university studies or first jobs. The older cohort, on the other hand, was at the end of their university studies, advancing their professional careers and/or forming or consolidating a family<sup>7</sup>.

The interviews consisted of one session of from one to two hours in a place mutually agreed by the researcher and the study participant. The interviews were conducted at people's homes, coffee shops, seniors' organizations, people's workplace, and at the University of Chile. The interview schedule included open-ended questions adapted from a study on personal communities conducted by Spencer and Pahl (2006), and a *resource generator* (Van Der Gaag & Snijders, 2005) especially created for this research with the purpose of exploring older people's social capital. A resource generator is an instrument for

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<sup>7</sup> According to Census data, in 1970 35% of people between 15 and 24 years old (current cohort of 60-69 years old) and 61% of those between 25 and 29 years old (current cohort of 70-75 years old) were married; 43% of the former cohort and 62% of the latter were working.

the measurement of individual social capital that helps to identify accessed social resources and the ties by which such resources are accessed.

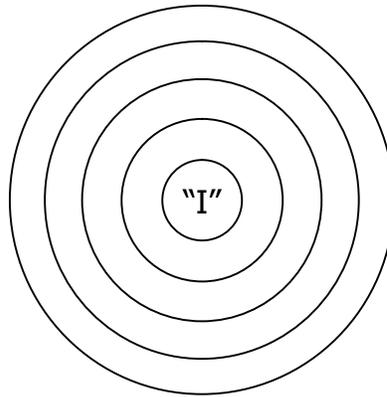
The categories of people who provided or received support and the items describing situations where help was received or provided, were based on the resource generator developed by Wellman and colleagues for the Connected Lives Project (2006). However, the items of the resource generator are context-based, as ideas about the usefulness of specific social resource vary among countries and populations (Van Der Gaag & Snijders, 2005). Thus, to ensure that the list of situations were meaningful to the life stage and socio-cultural context of the participants, the items of the questionnaire were adjusted based on the secondary qualitative analysis of the Domeyko focus group and the preliminary analysis of the first five interviews conducted at the beginning of the fieldwork.

The questionnaire sought to identify specific types of emotional and instrumental help exchanged with different groups of people (household members, close family, other relatives, neighbours, friends, organizations, and other non-kin ties). Adjustments to the interview schedule, including the addition of a resource generator questionnaire, were made after conducting five initial interviews. These changes were intended to improve the scope and clarity of the questions and to ensure a good flow to the conversation. In the case of the participants of those five initial interviews, a short follow-up by phone was added so as to obtain some information that was not obtained in the initial interview schedule.

The interviews included a method of 'mapping' personal relationships proposed by Spencer and Pahl (2004; 2006). This method is based on the hierarchical mapping technique

developed by Antonucci (1986), in which concentric circles are used to represent the personal network of the participant (figure 1).

**Figure 1: Diagram to map personal communities**



In the centre of the circles is the word "I" (Ego). The participants were asked to locate on the diagram the name of the people who were close to them. For the name elicitation the participants were asked to first make a list of people "who are important to you now". They wrote names or nicknames of the people, kinship, age, and geographical distance. This method was suitable to elicit the names of people who were relevant for reasons beyond the help exchanged and aided in exploring the meaning of personal relationships. The development of the list and the construction of the map was an activity that was very motivating for the participants. They took time to decide who should be included on the diagram, and where. During the interview, the diagram helped the flow of the conversation, connecting personal experiences and reflections on the history and qualities of participants' personal relationships (for examples of completed diagrams please refer to chapter 2, p. 46). As each interview developed, participants were allowed to include additional members on the diagram. All the participants elaborated the list of important people, but thirty-seven out

of the forty participants actually constructed the diagram of concentric circles. Only three participants could not complete the diagrams as two of them were blind and the other was illiterate.

The interviews were first fully read to recognize general themes. In a second stage data were segmented through open coding (Benaquisto, 2008). The codes that resulted from this process were of two types: *in-vivo* codes, which use participants' language to name the codes, and *significant* codes, which use the researcher's language to reflect the focus-of-inquiry of the study (King, 2008). The analysis of the data was aided with the software ATLAS.ti.

In a third stage, a more focused coding was conducted. Here, some codes were incorporated into broader categories and others were refined, thus creating and linking new codes that described more specific dimensions. Some of the codes created during the second stage had the purpose of identifying actors of the personal network as they were named at different moments of the interview. Other codes created in the second and third stage were more analytical as they sought to identify qualities of relationships and help exchanged, reflections and discussion regarding daily life experience, and conceptual themes. The idea was to link the identification codes with the analytical ones to reflect who was giving or receiving certain types of help to supplement the findings of the resource generator. In a fourth stage of the analysis, *axial coding*<sup>8</sup> was performed integrating the different codes

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<sup>8</sup> "Axial coding relates categories to subcategories, specifies the properties and dimensions of a category, and reassembles the data you have fractured during initial coding to give coherence to the emerging analysis" (Charmaz, 2014, p. 147).

created by establishing relationships amongst them with the aid of memos<sup>9</sup> and conceptual network maps.

**Figure 2: Example of axial coding using memos and network view for theme of “chosen and given ties” in men of 60-66 years old**

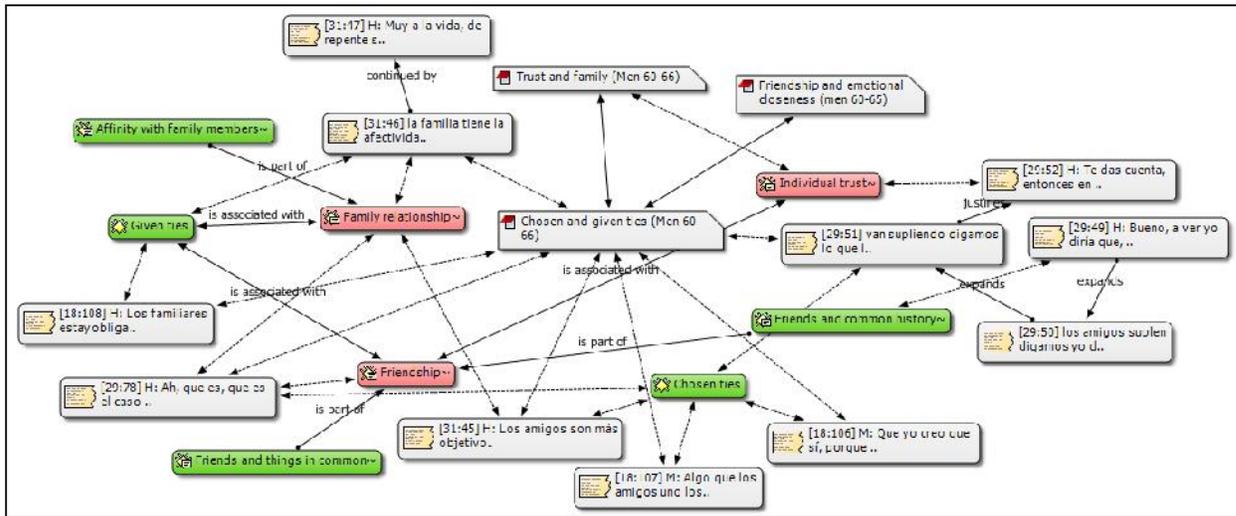


Figure 2 illustrates the process of axial coding using a conceptual network map, where the memo “chosen and given ties” is used as the central theme to integrate codes, memos and quotations. In the figure, nodes with yellow icon represent quotations, pink nodes correspond to codes created during the second stage of analysis, green nodes represent codes created in the third stage of analysis; nodes with red icon symbolize memos. Verbatim transcriptions of the interviews were in Spanish and therefore the quotations are in that language. Selected quotations were then translated into English to be used in the findings chapters.

<sup>9</sup> Memos allow comparing data, exploring ideas regarding codes, and directing further data production (Charmaz, 2006). Memos can go from very descriptive memos to more abstract and integrative ones. They can be used, for instance, to describe properties of a category, summarize ideas, link concepts, and include observations about the research process. In short, memos can be defined as “written records of analysis” (Corbin & Strauss, 2008, p. 117).

The diagrams of concentric circles that represent the personal communities of the study participants were classified in two forms: using Spencer and Pahl's typology, considering the number and type of ties included on the diagram, and applying a visual criterion based on how all the ties were located in relationship to the centre of the diagram. This visual criterion differentiated between hierarchically and clustered arrangement of ties on the diagram (for examples please refer to chapter 2, p. 46). Hierarchical personal communities are characterized by ties clearly organized using the different circles. In clustered communities, ties are located at the centre of the map, even overlapping one another.

In addition to the interviews, the document *Integral Policy for Positive Aging 2012-2025* (SENAMA, 2012) was analyzed using an interpretative narrative approach that focuses on the expressions of social meaning present in policies, such as beliefs and values that motivate specific policy definitions and actions. The analysis conducted on Chilean policy on aging was framed by three primary questions (please refer to chapter 2, Table 7) on the definitions, practices, assumptions and unexpressed themes regarding social relationships and social integrations in late life (Biggs & Powell, 2003; Grenier, 2012). For each primary question, secondary questions were added to examine specific topics. These secondary questions are based on the emergent trends and issues identified by Reichert and Phillips (2009) in their analysis of policy debates. Based on these secondary questions, I created codes to identify the main definitions and topics of interest discussed in the Policy. Although a thematic analysis was conducted, the main purpose of the codes was to provide a starting point to identify explicit narrative threads. The contrasting and comparison of these explicit

narrative threads with the available literature and the experiences of the study participants enabled the identification of assumptions and neglected issues.

#### **1.4.1. A word of caution**

The findings presented in each chapter are accompanied by quotations from the interviews and, in the case of the fourth chapter, by quotes from the Policy document. The original language of all the data is Spanish and therefore the excerpts used in the chapters are translated from that language to English. In doing this translation I have faced the challenge of making the quotes understandable in English while preserving, as much as possible, the original quality of the expressions used by the study participants (rich in colloquialisms, idiomatic phrases, and metaphors). The final result is a patchwork of “correct” English with not-so-idiomatic English expressions. I take responsibility for this final result, recognizing that the reader will need a fair amount of imagination to make sense of the quotes. However, I also feel committed to making the “voices” of the study participants heard as closely as possible to their original uniqueness. After all, this thesis was only possible thanks to them, who so gently and willingly allowed me access to their social worlds.

#### **1.5. Organization of the thesis**

The next three chapters present the results of the study. Each chapter should be read as self-contained papers that provide more detailed information on the specific methodology and conceptual framework used. The chapters have been organized to present the findings from the micro experiences of personal relationships in old age to the way in which such experiences intersect with more macro processes.

The second chapter "*It's an intimacy criterion*": *relationships in late life from a personal communities approach*, is framed by the perspective of individualization that sees personal relationships as a source of meaning and sense of belonging. It analyzes the diversity of ties that form older people's networks although more specifically attending to their emotional and meaning function. The analytical framework used in this chapter is based on the perspective of *personal communities* proposed by Spencer and Pahl (2006) to emphasize a subjective identification and definition of ties that are considered important by the older person.

The third chapter *Bridging and bonding social capital among Chilean older people*, complements the first, giving a broader picture of older people's personal networks and the resources embedded in those networks. The aim of this third chapter is to examine whether and under which circumstances different types of personal ties are used by older people as bonding or bridging social capital. The experiences of the study participants were summarized in three analytical themes that enabled us to explore the function of friends and family ties and the circumstances under which these ties are selected to exchange particular kinds of emotional and practical help.

The fourth chapter *Public policy and experiences of aging: social relationships and social integration in Chilean policy on aging*, uses a narrative approach to examine what forms of social integration are fostered by Chilean policy on aging in comparison to the ideas and practices relative to personal relationships and social integration as perceived by older Chilean people. Based on Scharf's (1998) distinction between integration through *formal* and *informal relationships*, the forms of social integration explored in this chapter are: social

integration through formal relationships (e.g. participation in the labour market) and social integration through informal relationships (represented by family and friendship networks). The document *Integral Policy for Positive Aging 2012-2025* was analyzed using an interpretative narrative approach that focuses on the expressions of social meaning present in policies, such as beliefs and values that motivate specific policy definitions and actions.

Finally, the conclusion chapter connects chapters 2, 3 and 4, stressing the practical, methodological, and theoretical implications of the research findings. The findings of these chapters are interpreted in the conclusion by connecting the nuances in the meaning and function of personal ties in later life with the particular socio-cultural context of Chilean society characterized by low institutional trust and neoliberal social policies.

Using different angles of analysis to interpret the data, this research contributes to existing literature on social capital, personal communities and policy analysis by: a) clearly differentiating bonding from strong ties, and bridging from weak ties, while stressing the role of bonding ties acting as bridging social capital to connect the older person to key symbolic and practical resources in a context of low trust; b) offering a conceptual and methodological framework to recognize the normative and cultural aspects of social policies on aging; c) explicitly considering the role of the socio-cultural context of a country of the global south in the creation of personal communities.

## 2. "It is an intimacy criterion". Relationships in late life from a personal communities approach

*When I met Claudia she apologized for making me wait in the lobby of the apartment building. She told me that one of her granddaughters, a 6 months old baby, had some health problems during the night and she was talking by the phone with her daughter to check that everything was fine. The interview was constantly interrupted by phone calls (Claudia always kept her Smartphone close) from her daughter, an older granddaughter who needed something from Claudia, and a friend who wanted to discuss a personal problem and confirm that Claudia and she would meet next day to go dancing. Also another friend called to confirm that Claudia and she would meet for lunch soon. Claudia's little granddaughter was in the hospital and she offered to go there to see her and support her daughter. Then Claudia remembered she had also committed to go to her daughter's house so that the cleaning lady could enter. Immediately, she took her cell phone and called a friend, Ramon. Everything worked out well; Ramon will go to look after Claudia's daughter's house so that Claudia could go to the hospital. While all these arrangements were made by the phone, I checked the interview documents and noticed that Ramon had not been mentioned as part of the support network, though Claudia located him almost at the centre of her map of close relationships. While apologizing for all the interruptions, Claudia commented what a good friend Ramon was, always there available to help her.*

### 2.1. Introduction

This field note excerpt shows the challenges of capturing the complex processes through which people support one another and the varied functions of personal relationships. In my interrupted interview with Claudia, I had the opportunity to experience how social capital is mobilized to address daily and unexpected issues. And not only that, I could also see how difficult is to recognize the diverse functions and meanings of personal relations. Why was Ramon not present in Claudia's support network? Was it just a methodological issue regarding the questions or are there more subtle functions and

meanings at play to make some ties more salient in certain situations? A reflection shared by another participant gave some clues regarding this issue:

[...] for instance, one day Nancy [*daughter*] was ill, I took her to the supermarket, but that has nothing to do with it [*to 'help' Nancy*] , [...] if you talk to me about those things [*giving help*], I would think about bigger stuff [...] because the other things are daily life stuff. If you are family, if you are ill, you go there, you take her there, but that is like, no, I don't count it [*as help*]. (Carmen, 66 years old)

Carmen's quotation shows how problematic it is to identify what can be considered as help. It was not only an issue of recalling instances, but a matter of what should be counted as help. The absence of Ramon in Claudia's support network and Carmen's reflection provide several insights into the different functions and meanings of personal relationships. First, regular exchanges of support tend to remain relatively invisible, being considered normal parts of daily life interactions. Second, the fact that some ties are not identified in the support networks does not mean they are less important. The question then is how can we make visible the ties that have become part of 'taken-for-granted' reality and how are these ties relevant to older people?

The literature on social capital, social support and social networks in late life usually describes and measures the resources available in the network of the older person (Bowling, Banister, Sutton, Evans, & Windsor, 2002; Gray, 2008; Tomassini & Glaser, 2007; van Tilburg & Thomése, 2010). Although some of that literature includes the concept of emotional support (Krause & Borawski-Clark, 1994; Krause & Rook, 2003) or measures to recognize emotionally close ties (Lang & Carstensen, 1994; Nyqvist, Gustavsson, & Gustafson, 2006), the studies rarely recognize the emotional nuances and the subjective meaning of those relationships (Forsman, Herberts, Nyqvist, Wahlbeck, & Schierenbeck, 2013; Roseneil &

Budgeon, 2004; Takahashi, Tamura, & Tokoro, 1997). This chapter starts from the descriptions of the function of social relations in modern societies (Beck & Beck-Gernsheim, 1995a; Fine, 2006; van Tilburg & Thomése, 2010) to stress the role of subjective meaning of personal relationships in late life. I seek to recognize the diversity of ties that form older people's emotionally close network of relationships or *personal communities*, as defined by Pahl and Spencer (2010), and the meanings and more subtle functions of personal relationships in late life, with particular attention to family and friendship.

The relevance of this research is rooted in the studies that have shown that having good family and friendship networks, as well as participating in the community, are at the basis of good health and wellbeing in late life (Antonucci, Birditt, & Ajrouch, 2011; de Belvis et al., 2008; H. Litwin, 2009; Howard Litwin, 2006; Lubben & Girona, 2003; Nyqvist, Forsman, Giuntoli, & Cattan, 2012; Takahashi et al., 1997). In modern societies, not only family relationships but also ties of choice may be particularly relevant to maintain physical and mental health (Allan, 2010). Personal relationships increase older people's capabilities to manage their own lives (Fiscella, Rivera, & Román, 2009), giving the possibility of accessing and using existing resources of their own network (Fiscella, Rivera, & Román, 2009). The functions of relationships in late life go beyond the provision of social support, they contribute on a more symbolic level with shared life events and common social activities (Forsman et al., 2013). The recognition of the emotional nuances and the meanings of relationships could be especially relevant in contexts of rapid change and modernization, where personal ties gain importance in providing a sense of certainty, continuity, and belonging.

## 2.2. Conceptual framework

Some authors indicate that we should understand the macro processes affecting the social relations of older people in the context of “accentuated modernization” (Allan, 2001; van Tilburg & Thomése, 2010). This context is characterized by a loss of influence of traditional social structures and communities in individuals’ lives and the greater responsibility that the individual has in managing risks and shaping her or his life course. This description is in line with what Beck and Beck-Gernsheim (2002) have defined as ‘individualization’. At the level of personal relationships, individualization is a move away from *solidaristic* social forms, such as family, social class and community, in which people were tied to each other by instrumental interdependence to meet individual and group needs. In a different way, in modern societies, social relationships are voluntary and based on affection. Thus, personal security and social integration are no longer given by traditional means of collective identity and meaning (Baars & Phillipson, 2014).

In individualized societies, risk has to be managed individually, creating greater uncertainty for individuals. In this context, the function of personal relationships is particularly important as these relationships appear as an important resource to be re-embedded into society, offering a sense of meaning and belonging. In other words, in the context of late-modernity, personal ties provide not only different types of instrumental help, but they also work as a benchmark for identity construction (Allan, 2001; Spencer & Pahl, 2006).

Different family structures are becoming more common and accepted. The cohorts that initiated and experienced changes such as cohabitation, multiple marriages, singlehood, non-marital childbearing, and childlessness are now entering old age (Hughes & Waite, 2007). These changes were accompanied by transformed family roles and relationships that challenge the definition of what constitutes a family and the obligations among family members (Hughes & Waite, 2007; Phillipson, 2013). In current times the limits of kinship are becoming blurred and the networks of potentially meaningful relationships enlarged (Phillipson, 2013; Spencer & Pahl, 2006).

Traditional notions of community, solidarity and family have obscured the potential of other types of relationships that the current demographic and cultural contexts give (Phillipson, 2013). According to Wellman (2001), community has become embedded in social networks and it is no longer easily observed in specific groups and public spaces (e.g. neighbourhood). From this perspective emerges the concept of personal communities, which are “networks of sociability, support, and identity, where each person is at the Ptolemaic center of his/her own universe” (Wellman et al., 1997, p. 28). The concept of personal communities, as developed by Pahl and Spencer (2004, 2010; Spencer & Pahl, 2006), captures the voluntaristic element of developing and maintaining personal relationships in the context of individualized societies (Phillipson, 2013). It also adds a conceptual insight to better understand personal relationships in modern societies:

we use the term ‘personal community’ to refer to a specific subset of people’s informal social relationships –those who are important to them at the time, rather than all the people they know no matter how tenuous the connection. Consequently, personal communities represent people’s significant personal relationships and

include bonds which give both structure and meaning to their lives. (Spencer & Pahl, 2006, p. 45)

The personal communities perspective is different from the “whole network” view that focuses on the entire set of ties (Chua et al., 2009b), i.e. the connection among all the members of the network. While a network perspective focuses on the structural and interactional characteristics of personal ties, such as size, physical distance, and frequency of contact, a personal community standpoint attends to the content of the relationships (Pahl & Spencer, 2004; Spencer & Pahl, 2006) and the way by which such relationships are signified. Considering personal relationships as part of personal communities enable to consider the interplay of different types of social ties, while recognizing that people act as managers of their networks of relationships (Phillipson, 2013).

The personal communities’ perspective complements other approaches that pay more attention to the instrumental help and more observable resources embedded in the personal network, such as social support and social capital, by adding a more symbolic level of analysis. In that sense, the function of personal ties as constructors of identity and givers of meaning is central to the idea of personal communities. These communities provide a sense of stability and continuity to the individual through shared memories, even when individuals face change. Spencer and Pahl (2006) have defined them as “communities in the mind”, as they are not geographically bounded nor directly observed in an identifiable social grouping. Instead, the framework to analyze personal community is the recognition of people who are or were important in the person’s life (Chua et al., 2009b; Spencer & Pahl, 2006). In this manner, the concept of personal communities is very appealing to recognize and

understand the array of people with whom older persons relate and the underlying motivations to create and maintain these relationships.

A priori definitions of relevant ties are avoided by the personal community approach as they could hide the subjective meaning and experience of the relationships. The latter is central since family ties, particularly nuclear family ones, have been usually assumed as the more important relationships in late life (Takahashi et al., 1997) and “just knowing the type of family connection tells us nothing about the quality of the individual tie” (Spencer & Pahl, 2006, p. 33). These kinds of assumptions obscure the subjective meaning given to relationships, their more subtle functions, and the importance of other type of ties, such as friends, fictive kin and extended family members. With a focus on subjective ways of signifying relationships, Spencer and Pahl move forward from distinctions of kin and non-kin ties and assumptions of personal proximity based on partnership or biological affiliation (Wall & Gouveia, 2014).

The authors use the concept of “suffusion” (Spencer & Pahl, 2006) to indicate the blurring boundaries of categories of kin (‘given ties’) and non-kin (‘chosen ties’) relationships. The idea of suffusion puts into question this dichotomy as both kin and non-kin ties have elements of personal choice and provide –depending on the circumstance- similar resources to a person’s life. For instance, some friends are considered as family and provide help usually given by family members, while a sister-in-law is regarded as friend to whom a person can confide personal issues.

Recognizing the varied composition and structure of personal networks, Spencer and Pahl (2004) distinguish different typologies of personal communities:

- 'Friend-like community': friends have a central role and outnumber family members.
- 'Friend-enveloped': family members occupy the center of the map and friends surround that centre.
- 'Family-like': family members outnumber friends.
- 'Family-dependent': family members not only outnumber friends but also provide more support.
- 'Partner-based': partner is regarded as the focal point or only significant tie in the personal community.
- 'Professional-based': central role played by professional sources of support (e.g. therapist, counsellor, lawyer).

Because the method employed by Spencer and Pahl is highly inductive, the categories proposed may or may not be found when conducting studies in other contexts.

### **2.3. Methodology**

The analysis conducted for this chapter sought to identify the subjective meaning of relationships in a cohort of people between 60 and 74 years old. Forty men and women between 60 and 74 years old living in the city of Santiago, Chile participated in in-depth semi-structured interviews. The participants were selected using a theoretical sampling strategy (Mason, 2002). Gender and cohort criteria were important for the sampling strategy and the process of analysis. Gender was central as personal relationships of men and women are

differently structured. While widowers tend to be remarried, women tend to remain single. This also creates cohort differences as widowhood becomes more common among women as they grow old. Cohort differences are also important because of life transitions. In the case of the younger cohort, people have recently retired or are in the process of retirement<sup>10</sup>. In addition, studies on personal relationships in late life have shown that women receive more help from and have better relationships with friends and family members than men (Cornwell et al., 2008; Tomassini & Glaser, 2007).

The focus on a young cohort of older people sought to increase knowledge of a cohort that includes baby boomers, which has not yet been sufficiently studied in Chile on matters concerning their personal relations. In addition, a better understanding of personal ties in people of young cohorts of older people is of great importance for public policies in Chile as they are and will experience the consequences of the demographic changes that impact the structural availability of traditional means of informal support (i.e. family ties). Finally, the young cohort of older people lived in a central life stages during a critical historical period. During the dictatorship period, Chilean people experienced drastic changes in their personal relationships as well as the context in which such relationships were developed and enacted. In 1973, the younger cohort of older people was at the beginning of their university studies or first jobs. People of the older cohort, on the other hand, were at the end of their university studies, advancing their professional careers and forming or consolidating a family.

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<sup>10</sup> The retirement age in Chile is 60 years old for women and 65 years old for men.

The selection of the participants was initially made from older people that participated in a series of focus groups conducted by the Domeyko Program on Aging of the University of Chile in 2008. Only participants who were currently within the age range of 60 to 74 years were contacted. Some eligible participants could not be contacted because of change of phone number or health problems. In total, ten people from the Domeyko study were contacted and agreed to participate in the study. The other thirty participants were reached through older people's clubs and associations and by the snowball technique.

The interviews consisted of one session of one to two hours length. The interview schedule included open-ended questions adapted from a study on personal communities conducted by Spencer and Pahl (2006), and a resource generator (Van Der Gaag & Snijders, 2005). The close-ended questions of the resource generator were based on a secondary analysis performed on data obtained from the focus groups of the Domeyko study and preliminary analysis of the interviews conducted for the current study. The questionnaire sought to identify specific types of emotional and instrumental help exchanged with different groups of people (household members, close family, other relatives, neighbours, friends, organizations, and other). Adjustments to the interview schedule were made after conducting the five initial interviews to improve the scope and clarity of the questions and ensure a good flow of the conversation. In the case of the participants of those five interviews, a short follow-up by phone was needed to complete some information that was not contained in the initial interview schedule (see Appendix A for the revised interview schedule).

The interviews were aided by a method of mapping personal relationships proposed by Spencer and Pahl (2004; 2006). Their method is based on the hierarchical mapping technique developed by Antonucci (1986), in which concentric circles are used to represent the personal network of the participant. In the middle of the circles is the word "I" (Ego). The participants were asked to locate on the map the name of the people that were close to them. For the name elicitation the participants were asked to first make a list of people "who are important to you now". They wrote down the names or nicknames of the people, kinship, age, and geographical distance. This method was suitable to elicit the identification of people who were relevant for reasons beyond the help exchanged and also aided to explore the meaning of personal relationships. The development of the list and the construction of the map was an activity that participants found to be very interesting. They took time to decide who should be included on the map and where. During the interview, the map helped the flow of the conversation, connecting personal experiences and reflections on the history and qualities of participants' personal relationships. As the interviews developed, participants were allowed to include members on the map. All the participants elaborated the list of important people, but thirty-seven out of the forty participants actually constructed the map of concentric circles. Three participants could not draw the maps, as one of them was blind and the other was illiterate.

Verbatim transcriptions of the interviews were analyzed using the software ATLAS.ti guided by grounded theory principles (Charmaz, 2006; Corbin & Strauss, 2008). For the analysis, the interviews were first fully read to identify general themes and create initial codes. In a second stage, the codes were used to segment the data. New *in-vivo* and

*significant* codes were added as the analysis developed. The former type of codes uses participants' language to name the analytical categories (King, 2008). Significant codes, on the other hand, use the researcher's language to reflect the focus-of-inquiry of the study (King, 2008). In a third stage of the analysis, the data were integrated by establishing relationships among the codes with the aid of memos and network views. The maps were classified in two forms: using Spencer and Pahl's typology, considering the number, type, and location of ties included on the map. A visual example of the typology can be seen in the findings section (figure 46).

The next four sections describe the findings of the research. First, I show the composition of the personal communities, describing the different ties included by the study participants. Then I present the findings by applying the typologies of personal communities. In this section I also explain the rationale used by the participants to construct and explain their personal communities. The last two sections elaborate on the characteristics, similarities and differences of the relationship with friends and family members.

## **2.4. Findings**

### **2.4.1. Composition of personal communities**

When we try to characterize older people's personal communities, we notice some gender differences in the size of the personal communities and the diversity of members in the communities. Regarding size, women have larger personal communities than men (table 2). Perhaps the most noticeable indicator reflecting the differences between men and women is the proportion of people with ten or less members versus those with more than

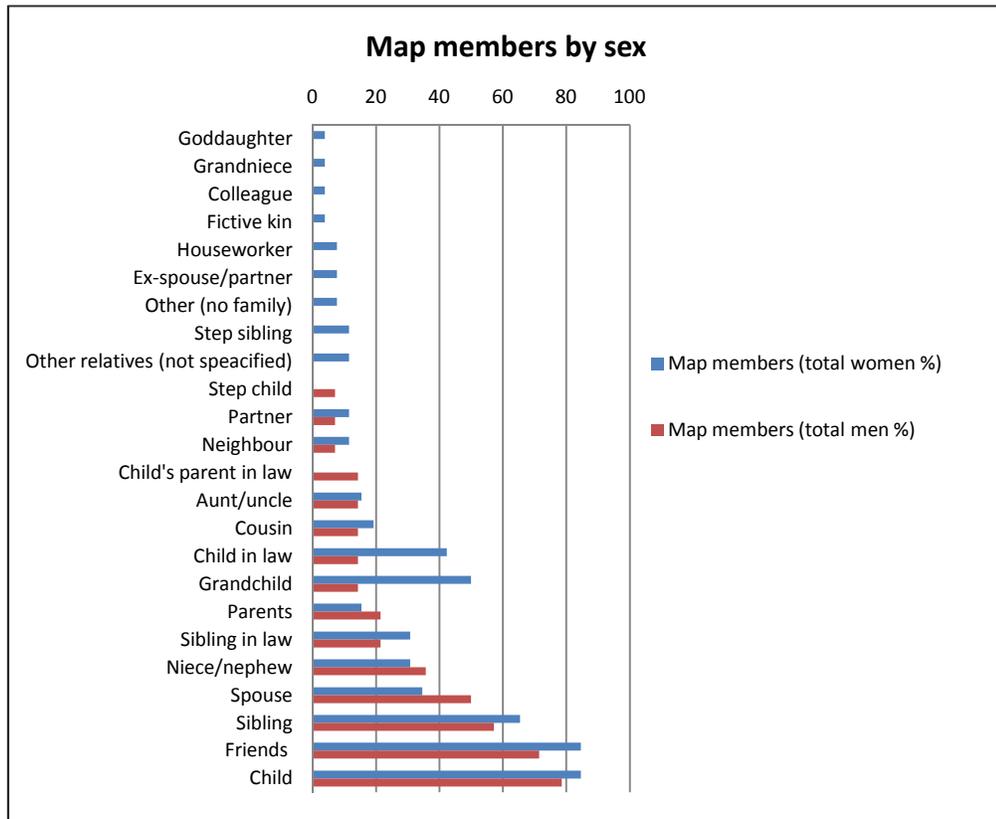
ten members in their personal communities. While men typically have ten or less members, women are likely to have more than ten members in their communities.

**Table 2: Size of personal communities**

Network Size	Women	Men
Average # members	16.9	9.9
Mode	11	7
Min. # members	7	3
Max. # members	35	26
≤10 members (%)	23.1	76.9
> 10 members (%)	71.4	28.6

Women not only have larger personal communities than do men, but also more diverse ones. Figure 3 illustrates this, showing all the types of ties that were included by the participants in their personal communities. The ties included by women in their maps include almost every type of tie. This is not true for men. However, when looking at the most commonly mentioned ties, results are similar for men and women. They both had friends, children and siblings as the most commonly included ties included in their personal communities. It can also be seen that for both men and women descendant nuclear family, children and sibling in-laws and spouses are present in an important number of cases.

**Figure 3: Personal community members in men and women**



It is interesting to notice that half of the female participants included their grandchildren in their personal communities, while only two male participants did so. On the other hand, men were more likely than women to include a niece or a nephew in their personal communities. The figure of the “niece/nephew” will be discussed later in this chapter.

The decision on who should be included on the map and how close to the centre the members should be located was based on two complementary logics: affection and availability given by physical closeness. The explanation by Rodrigo (67 years old) for of his map shows how both logics work and how much is implied in the notion of people considered as important in one’s life:

[...] It has two meanings, an issue more related to the contact through communication and, on the other hand, for the affection that one feels for the person, the closeness... and affection that in some way also means necessity of counting with them. I mean, they are like part of your life; they are accompanying in your own journey... eehh... You feel you need them beside you... I believe that talking about indispensability is going too far, but today, for instance if I stand today, for me they are very important in my life, for my life to have a meaning...

The logic of affection relates mainly to emotional closeness, sometimes also referred as love. In this regard, participants differentiate between being physically close and often in contact from being emotionally close to someone. Such closeness was given by the trust constructed over the years or by feelings of love toward nuclear family members.

It is an intimacy criterion, I would say. I mean, for me to be able to talk about yourself and listen the other with sincerity [...] You don't necessarily do that with your children, but the children are the children, they are at the center of the heart and with these people [*the ones on the map*], I mean all of them, I speak with an open heart and without limits... here I'm placing the people who really are my friends. I'm not putting people with whom I have to be careful. (Loreto, 64 years old)

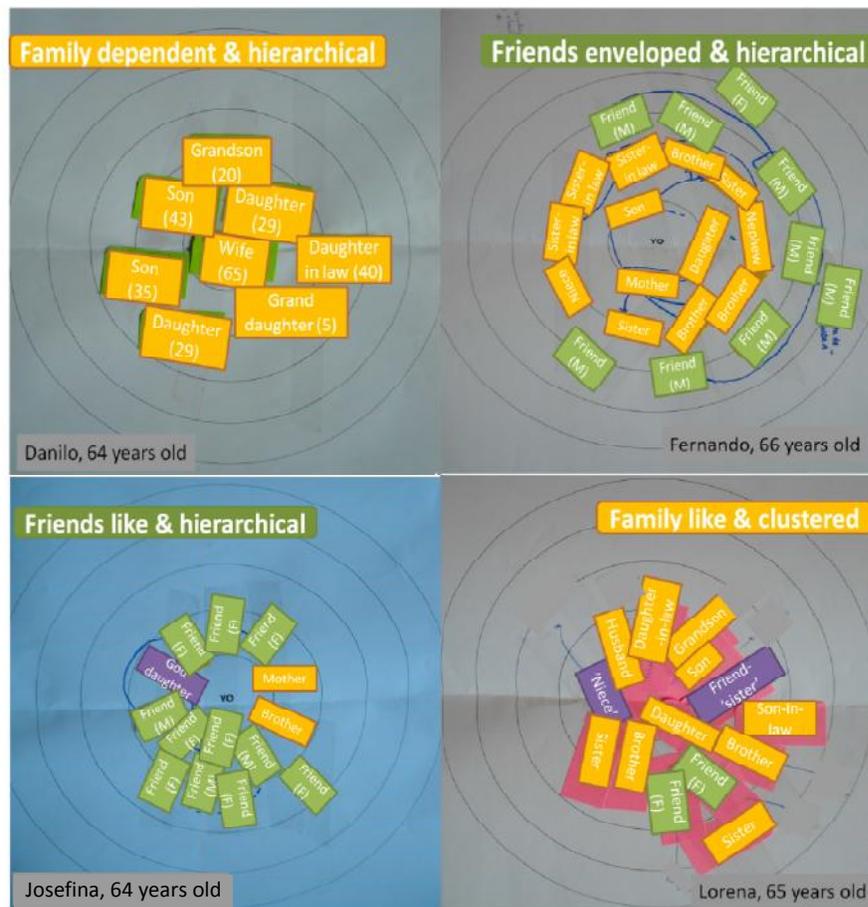
The second logic was physical closeness in which, though emotional aspects were considered, personal community members were mainly included due to the regularity of the face-to-face or by phone interaction.

They [*brothers*] are more distant because we see each other less, talk less [...] But my brother, Pablo for instance, I would say every other day, every two days I call him by phone or he calls me. (Raul, 67 years old)

Something interesting happened with the decision to not include certain ties, particularly in the case of partner and spouses in the personal communities. This did not always reflect a bad relationship but, rather, the manner in which participants understood the exercise of naming the people who were important for them or underlying assumption regarding the relationship. I will further elaborate this point in the section on family ties.

Although the ties included on the maps vary from person to person, the typology proposed by Spencer and Pahl facilitates the identification of some categories (table 3). Figure 4 serves as a visual example of how the categories work. To respect anonymity and confidentiality, the names on the labels have been replaced by the type of tie they represent.

**Figure 4: Typology of personal communities**



Friend-based personal communities are the most common among the participants, particularly *friend-enveloped* type of communities. However, the older group of men have equal distribution of *Family-dependent*, *family-like* communities, and *friend-enveloped* communities. The second most common category in the younger group of men and the older group of women is the *family-dependent* one.

**Table 3: Typology of personal communities (based on Spencer & Pahl's typology)**

		Friend-like	Friend-enveloped	Family-like	Family-dependent	Mixed <sup>11</sup>
Women	60-66 (n=13)	23%	38%	23%	15%	0%
	67-74 (n=10)	10%	50%	10%	30%	10%
Men	60-66 (n= 6 )	0%	67%	0%	33%	0%
	67-74 (n= 8)	13%	25%	25%	25%	13%

#### 2.4.2. Complementary typology

In addition to Spencer and Pahl's typology, I suggest a complementary classification that distinguished between 'clustered' and 'hierarchical' maps. This classification was originated from the overall visual difference among maps and considers the way in which the participants arranged the different ties on it in relationship to the centre. The table below summarize the findings using the proposed classification.

**Table 4: Proposed complementary typology of personal communities**

		Clustered	Hierarchical	Mixed
Women	60-66 (n= 13)	15%	69%	15%
	67-74 (n= 10)	20%	70%	10%
Men	60-66 (n= 6 )	0%	100%	0%
	67-74 (n= 8)	13%	75%	13%

The majority of participants designed maps with more or less clear hierarchies, i.e. members were clearly located on the different circles. In figure 4, the maps of Danilo, Fernando and Josefina represent hierarchical maps. However, six cases (one man and five women) have clustered and mixed type of maps. Participants who designed clustered maps

<sup>11</sup> Friend-enveloped/ Family like

located the majority of their community members overlapped at the centre of the map and had their communities composed by a variety of kin and non-kin ties. Lorena's map in figure 4 is a good example of a clustered map. The relevance of this complementary classification will be further elaborated in the discussion section.

A typology of personal communities is a first approach to understanding the meaning and function of relationships as it gives a visual snapshot of the underlying rationale to define important and emotionally close relationships. The next section further analyzes the ties included as part of the personal communities, with particular attention to family and friendship ties. It also describes the study participants' reflections regarding the role of different types of kin and non-kin ties that were not necessarily included as part of their personal communities.

### **2.4.3. Friendship ties in personal communities**

The study participants described the nature of their relationship with certain friends. In most of the cases, the friends included in their personal communities are people with whom they have a common history and/or share things in common.

#### **a. Friends and common history**

Fernando (66 years old) uses the distinction between "long-time" and "short-time" friends to categorize the friends included in his network. The former are people who continue to be recognized as friends up to the present, despite of the many different life stages and life experiences that have not necessarily been shared. In that sense, the event or

life period they shared in the past must have been sufficiently strong and important so that the friendship has been carried forward in time. In this regard, in the case of Chile, it is unquestionable the important role of shared experiences during the hardest years of the dictatorship, particularly for the group of men and women between 60 and 66 years old. That is the case of the friends included in the personal communities of Fernando, Josefina, Blanca, and Paulina. Some friendships were developed before the coup d'état with university mates and were nourished by militancy and experiences of prison and exile. Other friendship ties were created during the period of exile and include both Chilean and foreign friends.

Maria is another friend we always get together. Gloria for instance, is going to be a friend for life because we were imprisoned together, so we have, eh, and Javi is a friend from the university and we have all this history together, you see? I mean, with her family, exile, all that. (Paulina, 65 years old)

However, cases in which friendship was created during school or university years, or children's school years are more common among the study participants. In fact, the majority of the women between 67 and 74 years old mention friends they met many years ago, at the school, in their childhood neighbourhood, and in the neighbourhood they used to live when they were just married. The relationship with some of those friends has been sporadic, but others included among those ties people who have accompanied them through almost their whole lives.

this are friends from all my life... because I'm from province, so you go to the school, you have worked in the same place together, eh, is like we have grown up together, we don't see for a while, but we meet again and it's as if we had never been apart. (Catalina, 68 years old)

Both men and women, especially those in the cohort between 67 and 74 years old, also mentioned friends met during the time their children were at school. However, in some

cases the relationships have weakened as the children grow-up and the instances to spend time together are less bounded to children's activities. The case of men in this cohort is interesting as only three out of eight participants included friends in their personal communities. In two cases the circumstances that joined these men with their friends were related to the military service. Emilio (71 years old) and Raul (67 years old) mention how the shared extreme circumstances facilitated the creation of a close bond that lasted until today.

There is another version of friendship with people with whom participants have interacted for a relatively long time. This type of friendship does not necessarily imply a specific event shared in the further past. They are more about longstanding interaction with people who are not necessarily intimate confidants. These friends include neighbours and members of a group in which both individuals have participated for a long time (e.g. workplace). In that sense, this type of friendship has a component of a given tie as the relationship is based on the space and time that has continuously been shared. In other words, these are friends that are part of participants' daily or weekly landscape, and from that constant –given– interaction a different bond has been developed.

[...] short time friends are those friend that I met I would say in the last 10 years, for instance Jose, or Paolo, or Francisco, ok, who are friends I knew at work and there we developed a type of friendship that we are strengthening even more today, because we are more or less in the same page, almost all of us are in the same conditions. (Fernando, 66 years old).

The distinction between short-time and long-time friends does not simply imply the amount of years people have known each other. Going back to Fernando's reflection, short-time friends are those that were met during the current or most recent stage of their life (this participant retired 6 months before de interview). In that sense, long-time friends are

better defined by the amount of life stages that have been shared during people's lives. In this manner, long-time friends represent long lasting relationships with people who have been more or less constant companions through different life stages and contexts. Some of these relationships may have disappeared for a time to be later reencountered along the way.

#### **b. Friends and shared interests**

Common interests gather people together to initiate friendship relationships. In some cases, the things in common are part of a shared history, but in others, new members are incorporated to the network as new interests arise. Loreto (64 years old) reflects on the friends she incorporated in her personal community when asked about people with whom she has more things in common.

Wow! It's a hard question, a little piece of each one... (Sigh) the thing is that in this moment my central friend, with whom I feel more comfortable, is she [*pointing to the map*] who is relatively new [...] because today, today for me is the ecological thing, the plants, that, so we are sharing that, the searching of those things.

From the accounts of the participants we can recognize different types of friends who connect with different interests and needs: recreational, intellectual, professional, intimate confessions, and support. A good example of the latter is Luciana (62 years old) who identifies "thematic friends" that match the variety of interests she has. Some of Luciana's friends are connected to a specific place, e.g. civic organizations, seniors' clubs, and work. These place-bounded friends are common in men between 60 and 66 years old. The shared interest among the study participants and these friends are basically professional and recreational. Some of the professional-based ties started as workplace interactions and with

time developed into a closer relationship. Other friendships started in a non-professional context and it was the realization of the common interests and areas of work that helped to create a closer bond. However, some of these friends are left as organizational-bounded relations, in the sense of being recognized as workplace friendships that do not cross the boundaries of the professional setting where they were established. The majority of male participants of the younger age group talked during the interview about these types of relationships, but only three of them included these friends in their personal communities.

The younger group of women participants have similar experiences, with cases of organizational-bounded relations and relationships that have overcome the specific setting. Women between 67 and 74 years experience something similar with groups formed around a specific area of interest. Whereas in some cases group participation is a good catalyzer to develop more permanent friendships, in other cases this type of relationship is bounded to specific topics and places without developing into a confidant tie. The latter, however, does not necessarily have a negative connotation. As Catalina (68 years old) expresses, these type of friendships bring something different to her life, introducing variety to their relationships as they enable her to explore other areas that are appealing to her.

#### **2.4.4. Family ties in personal communities**

Study participants mentioned the different types of relationships they have with different family members included in their personal communities. Men mainly talk about the relationships they have with children, siblings, nephews, and in-laws. The figure of the nephew is interesting, especially in the younger group of men, as sometimes these relatives

take a place that is similar to a child. Two participants mention that they were involved in raising a nephew and receiving him in their home to support their studies. Women's closer relationships are usually described with siblings, cousins, children, and grandchildren.

Just as people share different things with different friends, they develop a different bond with different family members. Therefore, some elements of chosen ties can be found in this given family ties. Issues of common interests, personality, similar world views and shared experiences explain the closeness or intensity of the relationship with one or another family member. An excellent example is the different affinity that exists with siblings.

I meet more with him [*pointing to the name of one of the brothers*] than, for instance, my other brother [...] with Gabriela less than with the others, because there are affinities that are or are not, even being such close relatives. (Fernando, 66 years old).

Something similar happens with Pamela (60 years old), who describes a good and close relationship with her sisters, all of them included as members of the personal community. However, Pamela highlights that her more intimate issues are shared with only one of her sisters, the one she shares similar ideas, while the other sisters "live their lives differently to mine".

As we previously saw, children are among the main members of the personal communities and most of the participants with children included all their children as members of their personal communities. However, although all the children are regarded with love, the emotional closeness depends on personality characteristics and life stages. In some cases geographical distance and co-residence also plays a role in supporting this closeness.

My two daughters are very important for me, ok? Obviously, one lives with me, in the same building, the other lives 15 minutes from here, and obviously I'm closer to them, with the daughters more than the sons, ok? Then comes Lalo [...] he is a lawyer and sees all that [*legal*] things [...] I appreciate him very much but he is more distant, ok? And Andrés, my other son is shy [...] he doesn't share with nobody; he is apart, because he is single. (Marisol, 73 years old)

I have much affinity with Carolina, with Graciela too, the thing is that Graciela is too jealous, so she wants me only for her, with Simon yes, we get along, but he is too similar to his mom, so he has her character, he is very reserved with me. (Ramon, 69 years old)

The case of Cristina (62 years old) is a good example of how the relationship with children depends on their stage in life, since the presence of a partner and children also influences the time available and the priorities. When children are married or cohabitating with a partner, the affinity with that partner could influence the relationship with the child:

If you see, my children are there too [*pointing to the diagram*]... both have their own lives, their own families [...] but they're not so close now, I mean, I know they love me as much as I love them but... they're not there when I need them. When they need me, yes, the first person they resort to is their mom! But... or they have an excuse or something... my daughter, I described her earlier, is quite pretty but unfortunately has a husband who is a cave man, mmm... there was a time where we couldn't go to her house, he didn't allow me to call her by phone [...] My son, as I told you, he turned 40 today, and has a family that I believe he idolizes.

The inclusion of spouses and partners as members of the personal communities reflects very complex situations and logics. As mentioned in the previous section, not all the study participants included their spouses or partners. The case of Raul (67 years old) and Santiago (68 years old) illustrate one version of the latter situation. Their relationship with their wives could be described as bad in the case of Raul and just fine for Santiago, with no major complicity or sharing of daily life experiences. A very different version of people who did not include their spouses is well exemplified by Emilio (71 years old) and Fernando (66 years old). In their cases the relationship with their spouses was taken for granted,

representing unquestionably important ties that did not need to be mentioned. In the case of women, on the other hand, some of those who were partnered but not cohabitating decided not to include their partners explaining that the relationship was still very casual, “an amusement”, as one of the participants said. Another reason for not including the partners is well represented by Marisol (73 years old), who indicated that they preferred to keep the family life fairly separated from their romantic relationships.

Interestingly, other study participants gave a place in their personal communities to partners or spouses despite a dim or negative relationship. Cristina (62 years old) and Susana (73 years old) are good examples of the latter situation. They both live with their husbands and declared themselves to be married, but at the time they began to talk about their relationship with their husbands, they clarified being actually separated. The relationship with their husbands is limited to mutual instrumental help and reception of economic support from their husbands, but the affective part of the relationship has been missing for years. Cristina explains

We still live in the same house. At the beginning it was a very bad relationship, but now is civilized. I mean, there're weekends we can share the lunch or have tea... and since I'm pensioned he took care of all the household expenses because, really, I cannot, not that I do not want, I cannot.

Another interesting situation is represented by Estefania, Loreto and Pamela from the group of women between 60 and 66 years old. They are not currently married, but declare a good relationship with their ex-spouses or ex-partners. For both, Estefania and Loreto the decision is based on the family best interest, to keep children and parents in contact. However, it is not a forced relationship, and in fact they included their ex-husbands on the

map. The case of Pamela is different, as the ex-partner she included in the personal community is not the father of her children but is part of the family "landscape" and her personal history.

Most of the participants with children were involved in the care of their grandchildren but not without mixed feelings when issues of physical ability or personality interfered. Women were more likely than men to include their grandchildren, of different ages, among the members of their personal communities. The decision to include grandchildren is a good example of the logic underlying the creation of the personal community map. Some participants incorporated grandchildren because they love them and play an active part taking care of them. Beyond the instrumental support given to their grandchildren, the study participants talked about "enjoying" them. For instance, Rodrigo (67 years old) mentioned how much he appreciates the opportunity of sharing and witnessing how their grandchildren grow up, which was not possible with their children in the past. Other interviewees decided to leave their grandchildren out of their personal communities because of their age. They recognized that they love their grandchildren but preferred to limit their personal community to people with whom they talk and share common interests. For some participants with older grandchildren that was exactly the reason to include those grandchildren on their maps. For instance, Cristina and Pilar (from the younger cohort of women) shared a similar experience, in which the bond with their grandchildren resembled more a mother-child relationship than a grandmother-grandchild one. In both cases, they took care of their grandchildren from birth, as their daughters got pregnant at an early age.

Today, their grandchildren are adults, but the special connection with them continues as well as the exchange of emotional, practical, and material help.

Study participants used the distinction of 'chosen' and 'given' ties to describe differences between friends and family ties, respectively. These categories are nonetheless more complex than the binary distinction can describe as components of chosen ties can be found in given ones, particularly in the relationship established with members of the extended family. In fact, while some interactions with extended family members are based on customary relationships and contexts, such as family birthdays, in other cases, people find friendship in extended family ties. Even if the tie is not defined as a friend and not included on the personal community, the bond with some extended family members can become unconditional ties of deep affection. In male participants, this is particularly visible in their relationship with children's parents in law ('consuegros'), "very very interesting get to know my son's parents-in-law [...] it has developed into a bond of closeness" (Rodrigo, 67 years old).

Similar experiences are shared by women, although in their case the relationship is not with the 'consuegros', but with their sisters-in-law, cousins, nieces and nephews. Rosa (74 years old) comments on the relationship she has with her sisters-in-law: "my sisters-in-law are friends, absolute friends, not only kinship, the sisters-in-law on my husband's side, and two sisters-in-law on my brothers' side".

## 2.5. Discussion

This chapter has stressed the role of subjective meaning of personal relationships in late life so as to recognize the diversity of ties that form older people's emotionally close networks of relationships or *personal communities*. This discussion section seeks to elaborate on some of the findings in an attempt to explain some gender and cohort differences, as well as differences in study participants' experiences and definitions that emerged during the analysis. Also, we will explore some implications of these findings.

Despite the targeted scope of the research, the study findings can be compared with similar studies conducted in a different socio-cultural context. A study of personal communities conducted by Spencer and Pahl (2004) in England found that ties were selected according to three criteria: whether or not the ties were family connections; the quality of the relationship; and, the context of the relationship (frequency of contact, duration of the relationship and sense of continuity). Similarly, the Chilean older people used criteria of affection and availability given by physical closeness. Interestingly, the inclusion of family ties, especially nuclear family ties, was explained in the context of the relationship (availability and continuity) and not necessarily by a cultural norm of *familism*. In that sense, people use a criterion that is not exclusive to family ties when deciding who to include as part of their personal communities. Being available and having continuous relationships are characteristics that can be also found in neighbours and friends who live geographically close. According to McDaniel and Gazso (2014), family norms and values do not disappear in late modernity; instead, they get blurred. In the case of the Chilean people interviewed in

this study, the blurring of boundaries between kin and non-kin ties is visible not only in fictive-kin relations, but also in the decision of including someone in a personal community.

Regarding gender differences, we found that women's communities were bigger in size and more diverse in their composition than those of men. However, when we look at the members who are more usually included in the personal communities, we see similarities among men and women. Although men and women have similar types of personal communities with a majority of friend-based communities, differences by age interacting with gender are evident. Men between 67 and 74 years old have more family-based personal communities. The latter could be explained by a lack of opportunities or willingness to connect with people outside the family circle after their retirement. The inclusion of workplace-bounded friendships as part of men's personal communities supports this explanation. After retirement, the chances of keeping in touch with these friends as well as the continuation of shared experiences that are mainly bounded to the work place routine make it difficult for retired men to continue workplace-bounded relationships. Thus, the composition of the personal community would be affected, making it more family centered. Nonetheless, more research is needed to address the evolution of men's personal communities and friendship ties after retirement.

Another explanation for the prevalence of family-based personal communities in men between 67 and 74 years old could be found in the logic they use to recognize friends as emotionally close ties, as the friends mentioned by the participants of this group were characterized as strong bonds created during key life stages. In that sense, the inclusion of people regarded as friends and, moreover, as emotionally close friends, implies a very

selective criterion that cannot be easily achieved or replaced later in life. These findings align with the category of 'friends as particular individuals' proposed by Matthews (1983) in her study on friendship in old age. According to Matthews, these types of relationships refer to friends acquired early in life –during middle age or before–, with whom daily life encounters are important. People who only have 'particular individuals' type of friendships have fewer resources to buffer the effects of old age and are more at risk of isolation (Matthews, 1983). Chilean older women and the younger cohort of men would be better prepared to adapt to experiences of change and loss due to their ability to manage their relationships using a variety of strategies.

A third significant finding of the analysis relates to the study participants who included in their personal communities spouses from whom they were in fact separated or with whom they maintained an emotionally distant relationship, such was the case of Cristina, Susana and Raul. This decision may reflect the influence of socio-cultural values, although more research is needed to corroborate the motives for the inclusion these relationships. Based on secondary information, we can connect the finding to a moral imperative informing the inclusion of family ties. Under this logic, the inclusion of the spouse is done without further consideration as the spouse *must* be part of the circle in his or her role of nuclear family member.

The latter is reinforced by the highly regarded status of marriage in a country where divorce was legalized in 2004 and common law has only been legally recognized as January of 2015 (one year after the interviews were conducted). Also, the role played by the spouse within the household can influence his or her inclusion so as to recognize the degree of

dependency toward that person. Some study participants represent family trajectories that are consistent with patterns of individualization or deinstitutionalization of marriage and family life (with experiences of divorce, singlehood or childless singlehood as a lifelong choice). However, other participants show more traditional family arrangements and division of labour, exemplifying the outcomes of a United Nations Development Programme's report about gender equality in Chile: "Underlying the majority representations is the image that the man is the main responsible for providing financial resources through work and ensuring order through their participation in power, while the woman is in charge of the housework, parenting and the performance of the duties of caring for others" (United Nations Development Programme, 2010, p. 15). In that context, a woman may include her husband within her personal community, despite the quality of the relationship, because he is the main breadwinner of the house, or a man may include his wife recognizing her role as the main family carer.

Context-bounded friendship, such as workplace or seniors' club relationships, is another interesting finding that can have practical implications. These types of friendships are similar to Matthews' (1983) classification of 'friends as relationships'. In these friendships, a shared biography is not needed and the benefits available in the relationship are replaceable. Therefore, from a positive stance, these types of relations show that people can develop new relationships in a context that facilitates permanent encounters. Also, context-bounded relationships enable sharing with people who have similar interests, which are not necessarily present among family members. Thus, this type of friendship adds variety of topics and opportunities of professional or personal growth.

According to Matthews, people who develop friendships with a focus on the relationship instead of the particular individual are less likely to be at risk of isolation. However, as the Chilean findings indicate, depending on variables such as other types of relationships the person has, the level of sociability, or the opportunities to interact with other people, context-bounded relationships are difficult to keep if the person ends his or her affiliation to the particular context. According to Kahn and Antonucci (1981), and in line with the experiences of Chilean older men, people who mainly develop role-linked relationships are at greatest risk if the role is lost. However, as Matthews (1983) states and the cases of Chilean older women show, some people are able to create new roles that link them to others, to capitalize different types of situations to adapt to the changes of old age. In summary, the experiences of Chilean older people demonstrated that current demographic context and values offer opportunities to develop different types of relationships (Phillipson, 2013). At the same time, this context and values, along with the changes of growing old, pose challenges that can put at risk some individuals.

A fifth outcome of the analysis that requires some further elaboration is the role played by extended family members in older people's personal communities. Some literature has described that 'western' values of individualism and secularization have influenced family arrangements and have given a central role to nuclear family, emphasizing the emotional bond between spouses, and parents and children (Aboderin, 2005). Although partners and children are among the main ties of older people's personal communities, the results also show that extended family play a particular role. In-laws and cousins are characterized by some participants as friendship ties.

The relationship with grandchildren, especially in women, and nephews, in the case of men, is particularly interesting. Interviewees, in their role of grandmothers or uncles, gave accounts that showed that extended family bonds have a central function in supplying emotional, material help, and care. In her review of family ties in old age, Connidis (2009) noticed that uncles sometimes act as surrogate fathers, friends, mentors, or supplement the function of the parents. In the case of the Chilean men who commented on their relationship with nephews, their role can be described as mentors and supplement to parents. In their role as uncles they opened their homes to give their nephews an opportunity to study in the capital. The cases of women in their role of grandmothers resemble more, at least at the beginning, of a surrogate mother. They cared for their grandchildren to give an opportunity to their daughters to continue their studies. Their experiences serve as examples of emergent family roles and obligations in unconventional family structures. A grandmother taking care of her grandchildren is not new, but the content of the relationship developed with their grandchildren, due to the focus on affective elements, is more in line with descriptions of personal relationships in individualized societies. The relationship created with their grandchildren have remained close and strong as they grow old, and today these grandmothers are not only a potential source of material help, but also an emotionally close tie with whom personal and intimate issues are discussed.

Finally, the findings show an interesting notion of friendship. While family is 'given' and imposed, friendship, on the other hand, is a "constructed relationship" as Rosa (74 years old) mentioned. This idea highlights the element of personal choice involved in the development and maintenance of personal relationships. We can apply the notion of

constructed relationship not only to non-kin friends, but to any personal tie regarded as chosen and developed into a close relationship with features of friendship. The idea of constructed relationship involves a degree of complexity to the notion of friendship and chosen ties. Friendship is a constructed relationship that implies constant choices during a person's life trajectory within a specific time.

Consciously or unconsciously, people weight the amount of involvement needed to keep a relationship and whether such relationship is worth to be kept. In that sense, and in accordance to the idea of convoy (Antonucci et al., 2011), networks of relationships are not static. These networks as well as particular relationships evolve as people evolve. Some ties are important in their quality of "particular individuals" (Matthews, 1983), and are kept in recognition of the similar life paths or the life events that have been shared. Other relationships are further developed when common interests or world perspectives are recognized and thus, context-bounded and interest-specific relations are created. Yet other connections are put on hold and remain latent (Matthews, 1986) or are definitely terminated. Therefore, friendship has different shades and functions that need to be recognized and explored. Not all friendship relationships can be analyzed with the same lenses, as the relationships vary depending on the nature and history of the relationship, the context in where it was created, and the reasons for the construction and maintenance of the relationship.

## 2.6. Conclusion Chapter 2

Matthews (1983) highlighted the importance of subjective definitions in her study of friendship in old age. The author noted that researchers can get a clearer understanding of opportunities for friendship in old age by attending to the actual definitions used by social actors. She argued that commonly used approaches to study friendship use features and definitions defined in advanced by researchers, obscuring relationships that did not fit within the frame defined by the study and ignoring the quality of respondents' relationships. The same argument can be applied to other relationships, such as family ties. In line with Matthews' comments, the purpose of this chapter was to recognize the subjective meaning and more subtle functions of personal relationships to identify the diversity of ties in older people's personal communities. Through the analysis, I have aimed to stress the importance of emotional criteria in identifying the members of personal communities and increase understanding of the underlying reasons for creating and maintaining different types of personal relationships.

The concept and typology of personal communities proposed by Spencer and Pahl proved useful to analyze the composition of older people's network of close relationships and to recognize the importance of family members and friends in older people's lives. Overall, it showed to be a helpful methodological tool to identify both active and latent relationships. The relevance of the findings are conceptual, methodological and practical as the assumed role of family as the first line of support (Phillipson, 2013; Shanas, 1979a) ignores individuals' own definitions and experiences of family life. The approach of personal communities used to study Chilean older people helped to identify, using interviewees' own

definitions, the diverse forms and meanings of personal relationships in late life. In doing so, it has been possible to identify ties that would remain obscured because they are taken for granted interactions or because they do not supply easily identifiable forms of support. The attention to meaning allowed the identification of very diverse personal networks that include nuclear and extended family ties, different types of friends, and fictive kinship relations.

A particular contribution of this chapter is the proposed complementary typology based on the distinction between 'clustered' and 'hierarchical' personal communities. This distinction gives additional useful information to depict and define emotional closeness. The decision of some participants to represent their communities by clustering relationships at the centre of the personal communities diagram represents a sharp binary distinction that differentiates between the people who are emotionally close and those who are not. Emotionally close people are included in the community without prioritizing or segmenting the type or function of the relationship. In combination with Spencer and Pahl's categories, this additional typology can be a good addition to represent suffusion of personal relationships. In addition, the suffusion process represented in clustered personal community can be better understood through a consideration of the Chilean socio-cultural context. Issues of trust are more extensively discussed in the introduction of this thesis, but can be also applied in the interpretation of the meaning of clustered personal communities. In the Chilean context, where social trust is low, clustered personal communities may also mark a distinctive line between those who can be relied upon and those who cannot. Those who can be relied upon are at equal level, blending family and non-family ties.

From a practical perspective, the typologies of personal communities as well as the attention to the content of the ties open an opportunity to identifying the strategies used by older people to construct and maintain their social worlds. It also enables to notice gender and cohort differences in the way in which relationships are managed and defined. The role of the socio-cultural context and values influencing the rationale of 'clustered' and 'hierarchical' communities is an issue that can be further studied.

From a methodological standpoint, the study has shown the complexities of capturing and understanding personal relationships and the importance of considering the meaning that these relationships have in older people's lives. The inclusion of ties that were not emotionally close relationships in the personal communities corroborate that not all personal relationships are positive for older people. The latter should be identified when studying older people's relationships. More so if we consider that even a methodological tool as open as the one applied in this research cannot entirely capture the quality of the relationship, the complex socio-cultural frames at work, and the biographical components of relationships without further questioning and analysis.

### **3. Bridging and bonding social capital in Chilean older people**

#### **3.1. Introduction**

Traditionally, in Chile as elsewhere, family members have been the main care providers for older people. However changes in family composition, reduction of the average number of children per woman, increased participation of women in the workforce, and migration have affected the quantity and immediacy of the support available in late life; especially that exchanged among family members. In addition to these demographic changes, some scholars perceive a decrease not only in the quantity but also in the quality of older people's social capital due to the changing values associated with more individualized societies (Fine, 2006; van Tilburg & Thomése, 2010).

In a context of individualization, individuals reflexively seek relationships that are in line with their expected biographies (McDaniel & Gazso, 2014) and the exchange of help and support among family members is negotiated and guided by personal choice (Phillipson, 2003). Some critics argue that this greater freedom of choice represents a problem, negatively impacting the reliability of the personal network to look after older family members (van Tilburg & Thomése, 2010; Winter, 2000). Traditionally, research on older people's social relationships has emphasized the dynamics inside their homes and relationships with their family, with particular focus on availability of family care. A dominating perspective has been the notion of 'family first' with respect to older people's care and support (Biggs & Powell, 2003; Phillipson, 2003; Shanas, 1979b) . This notion is also present in the work of some social capital theorists, who regard family as a "bed-rock of social capital" (Winter, 2000, p. 5).

Despite this perspective, a growing number of scholars recognize changes in family practices and the emergence of different types of support and social solidarities that are as important as the nuclear family to older people's lives (Allan, 2001; Phillipson, Bernard, Phillips, & Ogg, 2002). Greater freedom of choice and autonomy does not necessarily mean the abandonment of practices such as reciprocity, trust and exchange of support (Phillipson, 2003, p. 63). Instead, new strategies and networks of solidarity can be developed by elderly people to get emotional and instrumental support, social integration, as well as to construct their identities.

This chapter aims to examine the broad spectrum of relationships that are relevant to older people by analysing the bonding and bridging properties of their social capital relationships. The focus is on examining whether and under which circumstances different types of personal ties are used by older people as bonding or bridging social capital attending to the subjective experiences of older people. It is not the intention of this chapter to quantify the emotional and practical support provided by different type of ties, nor to provide a definitive answer about whether family or friends provide more or less specific kinds of support.

There are two central points of attention and assumptions in this chapter; the first one is that we cannot make a clear distinction between bonding and bridging ties when analyzing the network of relationships of older people. Whether they provide emotional or practical support, family ties and friends would act as bonding or bridging social capital relationships depending on the circumstance. Connected to the latter, a second key point is to explore how some ties can help the older individual to connect not only with practical

support, but also with emotional support and different life styles. This point is particularly relevant to better understand how friends differ from family members when managed as bridging social capital. To address these issues I draw upon the experiences of Chilean men and women between 60 and 74 years old and explore the function of different types of personal ties, as well as whether and why the participants select specific types of ties to get emotional and instrumental support.

### **3.2. Bridging and bonding social capital**

From a structural approach, social capital has been usually theorized as beneficial; described as the glue and lubricant of community (Barrett, Hale, & Butler, 2013). However, studies on social capital have also shown its negative effects (Lynch, Due, Muntaner, & Smith, 2000; Portes, 1998), as it can be coercive, inhibiting individual actions and choices (Cagney & Wen, 2008; M. Leonard, 2004). Taking this into consideration, the structural approach also offers an interesting distinction between bridging and bonding properties of social capital, which allows us to address the not always beneficial effects of the network of relationships of which we are part. “Bonding” social capital refers to inward-looking connections that “tend to reinforce exclusive identities and homogeneous groups” (Putnam, 2000, p. 22). This type of social capital reinforces exclusive identity and tight bonds of solidarity, trust and reciprocity (M. Leonard, 2004; Phillipson et al., 2004). The negative aspects of bonding social capital are particularly important when studying social capital in late life, where situations of physical dependency can occur. Keating and Dosman (2009, p. 314) talk about the costs of bonding ties, as it can deteriorate family relationships, create feelings of exclusion, and even legal struggles in an economic context of limited formal care resources and increasing

demands related to population aging. Of course, bonding social capital can be also beneficial for older people, as bonding ties are well suited to provide practical and emotional support on a daily basis due to the intimate relationships among members of a group (Keating, Swindle, & Foster, 2005).

Despite the different roles that bonding and bridging social capital can play in older people experiences of aging, the studies addressing the different types of social capital in late life have tended to focus on their health effects (Ferlander, 2007; Norstrand & Xu, 2011). For instance, Murayama and colleagues (2013) found that bonding social capital was negatively associated with both poor self-rated health and depressive mood in older people, while those who strongly perceived their networks as heterogeneous –used as evidence of bridging social capital– were unlikely to be depressed and presented less cognitive decline than those with weak heterogeneous networks (indicative of bonding social capital). Based on a review of available literature, Ferlander (2007) observed that bonding and bridging social capital have both negative and positive health outcomes due to the different types of resources, support, influence and obligations they entail. For instance, bonding social capital tends to provide emotional support, impacting mental health through stress reduction, but at the same time it may create demands for conformity and restrict access to contacts and information resulting in unhealthy behaviours (Ferlander, 2007).

Although not always applying a social capital perspective, gerontological research has tended to address issues connected with properties described for bonding social capital when examining social support and informal caregiving in late life (Cagney & Wen, 2008). Here, the attention has been on family as the first line of support to care for older people,

stressing the importance of family relationships to provide support and care for old family members (Sheets, Bradley, & Hendricks, 2005). In this regard, family has been usually indicated as an important source of care for older people, as family ties are usually characterized as emotionally intense and mutually confiding relationships among people who spend high amounts of time together, provide reciprocal services and have a strong sense of shared identity (Keating & Dosman, 2009).

Although bonding social capital can be an important resource for particular groups, its benefits are limited. For instance, in the case of older people, small and intense care networks can be ineffective to connect to resources and services outside of the immediate care network of the older person (Keating et al., 2005). While bonding social capital is beneficial for “getting by”, “bridging” social capital is central for “getting ahead” (de Souza Briggs, 2003; Putnam, 2000). “Bridging” social capital is “outward looking and encompass[es] people across diverse social cleavages” (Putnam, 2000, p. 22). Thus, bridging social capital represents open networks of relationships that link to external assets, being useful to transmit information and generate broader identities and reciprocities (Phillipson, 2003).

Despite its relevance, bridging social capital has tended to be less discussed in relationship to older people as it has tended to be more associated with assisting people with access to the labour force (Keating et al., 2005). In late life, bridging ties can be crucial to deal with life transitions and to engage with new lifestyles. That is the case of people facing widowhood or those who need help to deal with abusive relationships (Phillipson, 2013), as bridging ties can help to access resource and emotional support that are difficult to get from people directly connected to the spouse and close family members. Bridging ties can be also

important to adjust to post retirement changes. In this regard, Cornwell, Laumann and Schumm (2008) found in his study on social connectedness that retirement is related to community involvement in late life. Although they do not elaborate about this topic, we could hypothesize that older people resort to different ties that help them to be connected to different areas of interest that cannot be covered by family relations.

Using the distinction of bonding and bridging social capital, Keating and Dosman (2009) studied the care networks of frail older people. The authors explored care as provision of practical support (e.g. housekeeping, meal preparation, grocery shopping, and transportation). In their analysis, the authors distinguished six types of networks: lone spouse, children at home, spouse and children, close kin and friends, older diverse (friends with smaller proportion of close kin and distant kin) and younger diverse (kin and friends, middle aged and younger, and employed). In line with the previous descriptions, the authors found that networks composed of close kin provide higher hours of care in comparison to friend-and-family networks. This close kin networks were described as tightly knit and formed mainly of co-resident adult children and/or spouses with high normative obligations to care for the frail older relative. The authors also notice that in intense caregiving situations, bonding has its drawbacks as close-family networks are less likely to receive formal support. Moreover, networks of close-family members that lived with the cared-for were less likely to bridge to formal support. On the other hand, more heterogeneous networks, formed of family members and friends, were more likely to bridge to formal services.

An additional insight that show us the relationship between bonding and bridging ties is provided by the study conducted by Sixsmith and Boneham (2006) with older women living in disadvantaged communities. Their approach focused on how such social capital was created, maintained and linked to health, attending also to the part played by older women in helping family and community members. According to Sixsmith and Boneham (2006), bridging social capital can help in the construction of bonding social capital. These authors state that women who actively participated in activities that sought to improve their communities had the possibility to work in collaboration with other community groups. Through this community work the women not only connected with people that otherwise would be absent from their personal networks but also developed feelings of empowerment and community belonging that reinforced their bonding social capital.

In addition to providing practical support and connection with formal support networks, the distinction between “bonding” and “bridging” can be of particular importance to understand social capital in late life in a social context where personal relationships are being described as influenced by individualization (Beck, 1992a; Beck & Beck-Gernsheim, 2002) or detraditionalization (Giddens, 1992, 1994). The latter means that traditional forms of representation and control coexist or are replaced by greater autonomy of action and freedom of choice. In this context, personal relationships are described as forged based on voluntariness rather than bounded by norms of moral obligation and familism (Fine, 2006; McDaniel & Gazso, 2014). From the perspective of older individuals, greater freedom of choice to manage their relationships and the resources embedded in their personal networks can be extremely important to maintain their autonomy. According to Cornwell (2011, p.

782), dense social networks do not always appeal to older people as they can present obstacles to privacy and autonomy due to higher levels of monitoring by the members of the network.

The study conducted by Sixsmith and Boneham (2006) also connects with issues of autonomy when analyzing the role of reciprocity among parents and children. The authors mention issues of 'negotiated reciprocity' to capture the complex feelings experienced by older people when receiving help from their children. While some interviewees understood and accepted support from their children as part of the parent-child relationship, others felt more uncomfortable and needed to be persuaded to accept this support. I highlight this concept as it can be useful to better understand the different circumstances under which older people prefer to resort to different types of ties, that although categorized as bonding social capital, can be managed in such a way that they offer a more suitable or comfortable solution for getting certain types of support.

From a theoretical analysis of the context in which people grow old and its effect on the inter- and intra-generational contract<sup>12</sup>, Phillipson (2003, 2013) states that the context of an individualized or detraditionalized society represents an opportunity to reconstruct the fragmented pathways of late life, where social solidarities are restructured by reconciling autonomy and interdependence. Also, the function of personal ties is different, as they are relevant not only for their instrumental features but also because they work in a more symbolic level. Relationships in the context of an individualized society would constitute

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<sup>12</sup> Agreement of mutual aid between and within generations based on social norms and values (Reichert & Phillips, 2009).

today's way for individuals to be "re-embedded into social life" (Fine, 2007: 185) through a sense of certainty, continuity and belonging. In this manner, personal ties are not only the source of potential resources to get help and support in times of crisis, but are relevant by themselves (Victor, Scambler, & Bond, 2009).

In fact, the latter descriptions of personal relationships in late life connect with the role of bridging social capital used by some authors. According to de Souza Briggs (2003, p. 2), bridging ties establish connections not only for accessing material and more practical resources, but also constitute bridges across roles, symbolic interests, and worldviews. In this way, bridging ties are of key importance to develop broader identities and communities of interest (de Souza Briggs, 2003; Putnam, 2000), and therefore they play a central role in older people's life and experiences of aging in the context of modern societies.

### **3.2.1. Distinguishing between bridging and bonding social capital**

In general, the basic distinction between bonding and bridging ties lays in the (dis)similarity between members of a network. However, the indicators of similarity and dissimilarity tend to vary depending on the study. For instance, Murayama and colleagues (2013) used age, gender, and socio-economic status as categories to measure degree of homogeneity and heterogeneity between a person and the members of his or her network. Norstrand and Xu (2011) assumed close ties among family members, friends and neighbours as indicators of bonding social capital, and expectations of support from organizations in which people participated as indicators of bridging social capital. In fact, it is not uncommon to find in the literature that key indicators of bonding or bridging social capital rest on the

assumption that bonding social capital can be equalized with strong ties (family and friends) and bridging social capital with weak ties (acquaintances and sometimes organizations) (Ferlander, 2007).

Despite being conceptually different, the two set of ties act similarly and thus are assumed as equivalent, as both strong and bonding ties are good to provide emotional and instrumental support, while weak and bridging ties are helpful to accessing to wide information (Ferlander, 2007). In gerontological research, the study conducted by Keating and Dosman (2009, p. 302) also used a similar distinction, stating that “[b]ridging social capital is more heterogeneous and is based on weak ties among network members”. To be fair, in the operationalization of the concepts Keating and Dosman focus their attention on the structural characteristics of the care networks (gender, age, proportion of care network comprised by kin, geographical proximity, among others). Interestingly, in their analysis and creation of a typology of six types of care networks, they stress the bridging properties of non-kin ties which facilitate the connection of the older person and its care network with formal care services. With this, the authors shift the attention from assuming (and defining) in advance that some ties are bonding or bridging, to describing bridging social capital based on the likelihood of some ties connecting the older person to resources that are not necessarily present in their more direct network of relationships.

Although the binary distinction between bonding and bridging social capital helps us to capture the complex and diffuse character of social networks, it can also lead us to assume that these two types of social capital are strictly mutually exclusive (Patulny & Lind Haase Svendsen, 2007, p. 36). Thus, using a binary distinction can be problematic and not always

productive to advance our understanding of how older people manage their personal ties. As Ferlander (2007) indicates, although a family is usually composed of a network of strong ties, it can be bridging in terms of gender and age. Leonard and Onyx (2003, p. 194) summarized the distinctive features of bridging and bonding social capital and theorized that the former is associated with loose networks, fairly strict reciprocity, thin trust, few shared values, and more instrumental use. Bonding social capital, on the other hand, is characterized by dense networks that serve a variety of functions –though they are less instrumentally used – thick trust, shared values, and long term reciprocity. However, Leonard and Onyx (2003) recognized that in their research, bonding social capital was present in both strong and weak ties.

In this chapter I support the idea that a clear demarcation for classifying ties as either bonding or bridging can be difficult to establish and perhaps not always necessary, as assuming a binary distinction can diminish the richness of the analysis and the complexity of the relationships and their qualities. When analyzing social capital in late life, we may find that attention to apparently homogeneous networks, such as family and friends, can disregard the array of resources they provide to the older person, and vice versa. In that sense, depending on the stage in life and situation, family and friends can be described as similar or dissimilar to the older person in terms of lifestyles and/or resources they can offer or help to connect. From a perspective of bridging ties as connecting structural holes in networks, certain people can bridge gaps between networks that are not necessarily formed by dissimilar people (R. Leonard & Onyx, 2003), or at least not by obviously recognizably dissimilar people. That would be the case, for example, of an older person resorting to a child

(a tie usually referred as bonding and strong) to get a referral to hire or get advice from a trustworthy professional who works with that child.

By attending to how (dis)similar ties (e.g. family and friends) act as bonding and/or bridging social capital depending on the circumstances and moment in life, this chapter examines the broad spectrum of relationships that are relevant to older people. These ties are relevant due to the practical and emotional support they provide as well as the different life styles they help to connect.

### **3.3. Methodology**

As previously stated, a challenge of studying bonding and bridging social capital relationships is that there is no standard form of identifying or measuring them. A qualitative approach to social capital represents an opportunity to get insights regarding the blurred boundaries between bonding and bridging social capital. In the present study<sup>13</sup> I avoided *a priori* definitions and categorizations regarding personal ties and social capital by attending to participants' definitions of who constitutes their network of important relationships. This chapter explores the function of different types of personal ties (e.g. family, friends, neighbours, and organizations), examining whether and under which circumstances these ties are used as bonding or bridging social capital.

A total of 40 men and women between 60 and 74 years old living in the city of Santiago, Chile participated in in-depth semi-structured interviews. This method provided a

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<sup>13</sup> The study was approved by the ethics committee of the University of British Columbia (UBC BREB Number: H13-02487).

flexible way to explore the different forms in which people identify and signify their personal ties and recognize the resources present in their personal networks. The participants were selected using first a purposive and then a maximum variation sampling strategies (Mason, 2002). With a purposive sampling strategy, some early sampling decisions are made based on the available literature. In the specific case of this study, some early decisions to select the participants were based on the literature on personal relationships in late life regarding cohort and gender differences. A maximum variation sampling technique seeks to engage different types of participants to ensure that a variety of experiences and views are being integrated in the study. This strategy seeks to gain greater insights into a phenomenon by observing it from different angles (Mujere, 2016), allowing the recognition of common patterns across cases with different characteristics (Patton, 1990). In this research, a maximum variation strategy sought to include the experiences and perspectives of those older people who did/did not participate in older people's organizations, people with different living arrangements, marital status and socioeconomic status.

The focus on people between 60 and 74 years old is relevant because it allows us to explore the personal relationships of a young cohort of older people that partially includes baby boomers; a cohort that has not yet been studied in Chile on matters concerning their personal relations and social capital. In addition, this cohort is of great importance for public policies because it would be the most affected by the decrease in family size and its effects on the availability of informal support.

The participants were initially selected from a cohort of older people who had participated in a series of focus groups conducted by the Domeyko Program on Aging of the

University of Chile in 2008. Only participants who were within the age range of 60 to 75 years were contacted. Because the Domeyko study was conducted more than five years prior to this study, people aged 60 to 65 years old were missing from the sample pool. Also, some eligible participants could not be contacted due to change of phone number or health problems. In addition, to compose the sample a relatively balanced number of men and women were desirable but the list of eligible people from the Domeyko participants had little representation of men (40 women and 15 men). In total, only 10 people from the Domeyko study could be contacted and were able to participate in the study. The other thirty participants were reached through older people's clubs and associations and then by the snowball technique. The use of the snowball sampling strategy intended to reach people, particularly men, who did not participate in clubs and older people's associations.

The interviews consisted of one session of one to two hours length in a place mutually agreed by the researcher and the study participant. The interviews were conducted at people's homes, coffee shops, seniors' organizations, people's workplace, and the University of Chile. The interview guide included open-ended questions adapted from a study on *personal communities* conducted by Spencer and Pahl (2006), a *resource generator* and questions regarding generalized trust. The complete interview guide can be found in Appendix A. Questions about trust were based on those included in two surveys that have been conducted in Chile: the World Value Survey and Latinobarometro (e.g. *Generally speaking, would you say that most people can be trusted or that you need to be very careful*

*in dealing with people?')*<sup>14</sup>. The resource generator is a questionnaire to measure individual social capital that facilitates the identification of specific social resources (e.g. information, transportation, jobs) and the ties (e.g. family, friends, colleagues) by which such resources are accessed (Van Der Gaag & Snijders, 2005). An advantage of the resource generator is that it does not require long interview sessions composed of multiple rounds of questions. The items work as a checklist that can be easily and quickly filled during the interview. However, the items of the resource generator are context-dependent, as ideas about the usefulness of specific social resources vary among countries and populations (Van Der Gaag & Snijders, 2005). The latter means that the items included in the questionnaire need to be theoretically and empirically grounded in order to include a list of relevant and meaningful ties and situations of help exchange (Ichirō Kawachi, Subramanian, & Kim, 2008).

The categories of people who provided or received support and the items describing situations where support was received or provided, were based on the resource generator developed by Wellman and colleagues for the Connected Lives Project (2006). This questionnaire was selected as the basis for our study due to the overall suitability of its items for different types of populations and the simplicity of its application, as it was conceived to be self-administered. To ensure that the list of situations were meaningful to the life stage and socio-cultural context of the participants, the items of the questionnaire were adjusted based on the secondary qualitative analysis of the Domeyko focus groups and the preliminary analysis of the first five interviews conducted at the beginning of the fieldwork. A

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<sup>14</sup> This question has been also used in the General Social Survey, conducted by National Opinion Research Centre. The indicators of trust included in the GSS were developed by Kawachi and colleagues (I. Kawachi, Kennedy, Lochner, & Prothrow-Stith, 1997).

central issue was to create a questionnaire that could be easily understood and quickly answered, with situations to which participants could relate. Instead of giving all the possible types of kin and non-kin ties, general categories were used. These categories distinguished between co-resident people, close family members, other relatives, neighbours, friends, organizations, and others.

The first two categories of people who provided or received support are similar, as they are mainly used to capture nuclear family members. However, these categories represent different people. The category of 'co-resident' comprises the people who live with the older person in the same household. The study participants, usually included spouses and children, but others also included parents and friends, depending on the living arrangements. The category of 'close family members', on the other hand, refers to nuclear family members from the family of orientation and procreation that live in a different household. This category was used by participants to include children, siblings and parents that were not living in the same household.

The questionnaire has a total of fifteen items that describe situations where the study participants have received support in the last year (e.g. 'advice on important issues', 'help to fix something at home', and 'information about recreational activities')<sup>15</sup>. Nine of those items are about instrumental and practical support, including situations where the study participants had received practical and material support: health issue, house chores, use a computer, legal advice and paperwork, transportation (including accompanying to a place),

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<sup>15</sup> For full questionnaire, please refer to Appendix A

emergency, watch over the house while the person was away, and little and greater economic help. Six items represent situations where the study participants received emotional help as well as support and information regarding recreational activities: counsel on important issues, counsel on work, daily talk, information on recreation, support in family issues, and company to events.

The 'constant comparative method' of analysis was used from the beginning of the study. This method enabled making decisions regarding initial data production and make changes as the research process developed (Charmaz, 2006; Corbin & Strauss, 2008). Verbatim transcriptions of the interviews were analyzed using constant comparative analysis with the help of the software ATLAS.ti. The interviews were first fully read to recognize general themes. In a second stage, data were segmented through open coding (Benaquisto, 2008). A previous study conducted in Chile (Guzmán, Huenchuán, & Montes de Oca, 2003), indicated that there are gender differences in the type of ties with which older people exchange help. Therefore, the analysis of the interviews compared the experiences of men and women in order to identify differences in the ties involved in the exchange of support and the situations in which support was exchanged.

The codes that resulted from this process were of two types: *in-vivo* codes, which use the language of the participants to name the categories, and *significant* codes, which use the researcher's language to reflect the focus-of-inquiry of the study (King, 2008). In a third stage, a more focused coding was conducted. Here, some codes were incorporated into broader categories and others were refined creating and linking new codes that described

more specific dimensions. Some of the codes created during the second stage had the purpose of identifying actors of the personal network (e.g. friend, child, and spouse) as they were named at different moments of the interview. Other codes created in the second and third stage were more analytical as they sought to identify qualities of relationships (e.g. confidant, companionship), situations of help exchanged, reflections and discussion regarding daily life experience, and conceptual themes. A specific code was created to identify instances where the older person or a tie acted as a bridging tie (link someone with a specific service, information, or other more knowledgeable or skilled person). Bonding social capital was recognized while analyzing the connection of the codes that identified actors with the analytical codes. Specifically, bonding social capital was identified during the analysis of types of support given or received by the older person (how did they access or help to access a specific resource), the quality of the relationship and how emotionally close this relationship was considered, and the subjective assessment of the influence of geographical closeness in turning to a specific person for support. The analysis of these codes supplements the findings of the resource generator.

As previously discussed, identifying bonding and bridging ties presents some difficulties. The aim of the analysis was not to develop self-contained categories, but instead to recognize the instances in which certain types of ties could be considered as bonding and/or bridging. Ties were classified as bonding and/or bridging considering: the function of the tie by examining the type of support provided (e.g. information that require looking beyond the immediate support network, practical support with household chores, emotional support with advice regarding family problems), whether the tie connected to resources that

were not directly present in the personal network, strength of a tie given by its emotional closeness to the older person (as defined by the participants<sup>16</sup>), and similarity or difference between the older person and the tie (e.g. kinship, age) with whom the help was exchanged.

### **3.4. Findings**

Just as we saw in the literature on bridging and bonding social capital, in our data we can distinguish instances in which ties take a bonding or bridging role by attending to the similarity or difference of the ties regarding the older person in different aspects. The criterion of similarity, however, presents certain challenges. When examining older people's social capital, we find that friends, children and spouses are the main providers of different types of support (see tables 5 and 6 at the end of this chapter), as well as the people more emotionally close to them. Depending on the situation, we may consider that friends and family share an array of characteristics with the study participants (criteria of similarity), thus categorizing them as bonding ties. However, the analysis loses depth when we group these ties and label them, as other studies have done it, as the same type of bonding social capital. In fact, as indicated in chapter 2, the participants clearly recognize differences between family and friends when describing them as 'chosen' and 'given' ties with whom they exchange different aspects of their lives. Not surprisingly, friends and family are usually separated groups that are only (or could be potentially) connected through the older person. A qualitative approach is suitable then to recognizing the nuances of the support provided by

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<sup>16</sup> The findings of the 'personal communities' methodology were particularly relevant to identifying the ties that were considered emotionally close by older people (see chapter 2: "It is an intimacy criterion". Relationships in late life from a personal communities approach").

different types of ties and whether apparently similar kinds of ties connect the older person with resources that could not be otherwise accessed.

The following sections summarize the study findings divided in three topics addressed in the analysis: resorting to help from others, friends as bonding and bridging social capital, and family as bonding and bridging social capital. After this section, a discussion of the main findings in connection with the literature is provided.

#### **3.4.1 Resorting to help from others**

Before distinguishing the circumstances under which certain ties act as bonding and bridging, it is necessary to understand the frames used by study participants to talk about those ties and the help exchanged through them. The central idea of this section is to describe the problematic character that asking for or accepting help from others has in the discourse of the participants. This is important as it allows us to better contextualize and understand the circumstances under which they use a tie considering its bonding or bridging properties to mobilize different types of resources.

Talking with the study participants about help and support received was not a straightforward situation. The answers that people decided to share are a partial reflection of a more complex process where personal experiences, family circumstances, and cultural context are at play. It is an issue that goes beyond the matter of who do I ask for what or who do I help in which situation. Speaking about help during the interview was problematic for some participants because the social status of being independent influences the way in which people value receiving help from others. Women and men both find asking for or

receiving help as problematic, as the idea of resorting to help from others is associated with notions of material and/or physical dependency and laziness.

There are different points of view regarding the issue of asking for help. While, for some participants this is not at all complicated, for others is almost problematic and requires some reflection due to the burden they may put on the relationship with other people, the status of dependency they might be seen to have, or the commitment this help may bring in the future. As Patricio (60 years old) explains, "I don't want to complicate others' lives".

Considering oneself as an independent person plays a role in the way people face the issue of help. In addition to trying not to bother others, some participants mention that they need to be consistent with how they have acted their whole life or that they need to demonstrate they can deal with things by themselves, "I can do this by myself" or "I came here to be stressed alone".

In two cases, the importance of independent arrangement to solve problems was stronger and asking for help to others was not an option. In this regard, women made not only reference to their feelings toward receiving or asking for help, but also reflected in a very complex way on the circumstances and conditions for that. Paulina (65 years old) uses an informal Chilean expression (*pedigüeña*) to stress that she is not one of those people who are always asking for something. Noticeably, despite their very different backgrounds, Paulina's expression also exemplifies very well Estrellas's (61 years old) reflection "You have to scratch with your own nails". However, this time the expression is not completely used to characterize an individual decision, but to stress how the context (particularly the state) has

not helped when she has faced hardships and how she does not trust the formal structures to support her in the future. Estrella talks about this:

They say [politicians] 'when you're 70 they will give you this and that'. Look, if you don't save for your retirement, you don't have pension [...] You have to scratch with your own nails, because if I don't work, I've always worked my backside off, I hadn't had what I have.

Three men share a similar preference to solve things by themselves. Interestingly, both support this preference with similar statements "I don't ask for favours" (Rene, 67 years old), "I'm reluctant to ask for help" (Juan, 74 years old). Interestingly, it is not that these men rejected help, but their conditions for being helped are based on an unspoken norm of reciprocity:

Look, I'm reluctant to ask for help. I offer my help, but it's different, and as a response, I have received [help]. Because I'm not one of those who is asking for things (Juan, 74 years old).

Similarly, other study participants alluded to how reciprocity, mutual understanding, and some degree of empathy eventually act so that they can receive help, particularly emotional support, without directly asking for it. All these characteristics seem to describe a bonding tie:

*I: So, about the help issue. How does it work between these friends and you? Or with the people of the family? Do you tend to help with things, or you ask them for help?*

Emilio: In general no... let's say, the family is not like that. Generally one knows that [he or she] has a problem and what [he or she] needs. That's the concept at least for us. With the friends, sometimes they shout, 'and what happen to you, tell me'. And many times one doesn't even need money, but someone to listen to you. And good thing is that they listen to you and nobody gives advice, unless one asks for it. And one does the same, I mean, a true friend, and when there is also love in the family, the richest part of the human being: time. That is really yours; you give time and it shows. (Emilio, 71 years old)

When my husband died this brother-in-law paid all of my daughter's university studies [...] Being that we are not that close because he is a very public person, very busy professionally, but when that happened, he said he was going to pay Lorena's university up to the last year, I have always counted on them. Then Ricardo, let's say, the other brother of my husband, ehh, he, with one of the brothers who died and with my brother Alan, they took charge of the funeral, I knew nothing (...) no, I can count on them, I'm very bad asking for help, they come [...] When I'm complicated [*with something*] they come to help me, I'm very bad asking for help, it's very hard for me. (Rosa, 74 years old)

Boneham and Sixsmith (2006) used the notion of negotiated reciprocity. In line with the findings of this research, Boneham and Sixsmith found that some participants expressed difficulty in asking for or accepting support from children. Reciprocity was negotiated in two ways: in the expectation of mothers to be helped now by their children and in the need of being persuaded by children to accept their support. In the case of the Chilean respondents we can recognize similarities with the second type of negotiation. In fact, despite the problematic character of asking for help, study participants do resort to others if need be. In some cases, asking for help is a less problematic issue, but some conditions may apply:

I would say that the offer of help eh, within the, the network of relationships one has is always welcomed, always welcomed, and the offer that one can make to this network should always be welcomed, and I think that it is. I think that it always is, eh, there are no individual worlds, independent and isolated. No, there is not; one can always give and receive, that's the thing. (Fernando, 66 years old)

From Fernando's perspective, receiving help was unproblematic when such help came from close ties. Five other men made a similar comment, indicating that they have no problem asking for help, alluding that people need others in order to accomplish things.

Reciprocity plays a role not only in facilitating the reception of help, as Juan's quote showed earlier, but it is also at the core of how asking for or accepting help is conceptualized. Study participants do not recognize an obligation between family members to exchange help.

They understand help exchange among close family members, and in some cases among friends, as part of a normal interaction that is not governed by a social norm. This is not the same as saying that help exchange is taken for granted. Instead the constant flow of help given and received acquires a natural character, similar to the notion of generalized reciprocity (Sahlins, 1972; Swartz, 2009). I will comment more on these findings in the discussion section.

However, when the tie is weaker or the help required is negatively perceived (particularly asking for money), the participants become more self-aware of the need to reciprocate:

Of course, so, no, no, excuse me, I think differently, to me it's not a commitment asking for help, it's not commitment, less to the children, less to the children [...] It's something natural, and I feel committed to nothing, to nothing, less with them. Now, if a neighbour, for instance, asks me something that... sometimes I rather not to. I have to be willing to let the neighbour asks me something, but it's not that I feel committed. (Danilo, 71 years old)

I think that in front of the difficulties that one faces in life, the first thing is to do your best effort trying to solve your problems, but we are in front of a situation where you cannot solve, eh... I believe that one has to ask for help, one has to go and ask for advice or help, and for that are the ties with who you feel you have the same commitment. I mean, the other way around, no? I mean, one has to be open for someone who is close to you, is going to ask something, and you have to be open, and you also have to do the best effort to give support [...], I believe that things are mutual, Ok?, I mean, one has to be willing to help, but also has one has to be willing to be helped by others, I mean, I believe that one cannot be selfish facing the other, of giving him the chance to show love, affect, appreciation [...]. (Rodrigo, 67 years old)

In both Rodrigo and Danilo asking for or accepting help opens the door for a two ways interaction. Despite Danilo's reluctance to recognize this help as a type of commitment, at the end the reception of help implies that the person must be willing to return the favour

in the future. The latter mostly applies to people who are not part of the emotionally close network of relationships, for example neighbours.

These findings regarding when and with whom to exchange help are particularly interesting as the value given to independence can encourage people to use and cultivate ties with bridging potential (Cornwell, 2011). However, as indicated by Leonard and Onyx (2003, p. 192), the expectation of return are more obvious, more immediate, and more explicit for bridging ties than they are for bonding ones. For the study participants, this means that using bridging ties could imply obligations to reciprocate, thus discouraging them from activating these ties. It is here, then, that resorting for support to ties that are both bonding and bridging becomes necessary. As a result, family members and friends are at the centre of older people's bonding and bridging social capital. In the discussion section, I will elaborate on these findings in connection with the literature.

The next sections examine whether and under which circumstances friends and family ties are used by older people as bonding or bridging social capital. In line with the literature, the bridging capacity of family and friends considers situations where these ties enable the older person to be connected with external resources present in other networks (Keating et al., 2005), such as referral, information and professional advice. In addition, we consider that in some circumstances the bridging capacity of friendship ties is different from that of family ties, as the former connect the older person with different life styles as well as emotional support in specific situations.

### 3.4.2. Friends as bonding and bridging ties

Although friends are part of the strong ties (perceived as emotionally close) that form older people's personal networks, they are not necessarily equivalent to bonding ties. As Ferlander (2007) indicates, some scholars frequently use bonding and bridging ties as equivalents of strong and weak ones. We can see in the study participants' experiences that friends, particularly those of long duration or those emotionally close who live nearby, act as strong and bonding ties, providing emotional and practical support. As such, some friends are regarded by study participants as similar to them, in terms of values and interests:

The family, we like it or not, we have to accept it, the friends we choose them. And usually we tend to choose people, except if it's a very special person, who will agree to our tendencies, we can talk, we can chat, we can have small differences, but I believe that we are close in values and ideals, in the same line. But at the same time, they have experiences and points of view different to us. (Julia, 74 years old)

Of course there are differences [*between family and friends*], because there with the family... for example one doesn't... have complicities and links of common life experiences, complicities, no? That, that we have lived experiences together and that one doesn't, doesn't have as topics with the family because no... they are friends' topics [...]. (Luciana, 62 years old)

Particularly for women, friends play an important role providing help in case of emergencies and when transportation is required; 38% of women have received help with transportation from friends in comparison to only 7% of men, and 35% of women and 14% of men have received help from friends in case of an emergency. Friends are also an important source of emotional support for both men and women, with 42% of women and 29% of men indicating that friends provide them with daily talk. When looking at the number, we see that there are similarities in the type of support provided by friends and family members. However, when we attend to the experiences of the study participants we can see that the

type of counsel and daily talk exchanged between friends and the older person are not necessarily the same as those exchanged with family members. Luciana and Julia's quotes are example of the ways in which family members and friends are regarded and how this impacts the types of topic that are shared when seeking emotional support.

At the same time, friends work as bridging ties, facilitating access to information, providing an array of advice in practical and professional issues, and acting as a bridge to accessing services. Friends, in comparison to other ties, are the preferred source of information and counsel for both men and women: 42% of women and 36% of men have asked for or received counsel on important issues from friends, and 31% of women and 36% of men have received or asked for counsel on work from them. Especially for women, friends are the preferred source of information on recreational activities, with 35% of women and 14% of men who indicated they have received or asked for such information to friends. Friends are also among the most common ties with which study participants have attended to events, with 42% of women and 29% of men indicating that they have asked friends to accompany them to events (e.g. movies, theatre, concerts, and celebrations).

According to Phillipson (2013, p. 123), non-kin ties are central to deal with periods such as retirement and old age, as those ties help older men and women to find and connect with new lifestyles. In many cases, the exchange of information on recreational activities is done with friends from organized groups and older people's clubs. For instance, Catalina (68 years old) comments:

Yes, my friends, because here everybody, very good ties are created here, so there is always a friend 'hey!, there is a concert, I got tickets, do you want to come?', Ok?, do you know what I mean?, so in that circle you create very good ties.

Also, friends' particular skills and expertise make them important to obtain information and counsel on legal and financial issues.

When there is something like that we told him, we ask him ehh... for advice. Let's say there is an investment we can make, something, something to buy... I don't know, there is so much legal stuff [...]. (Alberto, 71 years old)

In a similar vein, Paulina (65 years old) explains how a friend of hers helped to fix a problem with the social security contributions she made to a former house worker:

[...] a home worker I used to have, it looks as if I hadn't paid the social security contributions, for some months, but I always paid her because I, myself, signed her into the AFP [...] what happens is that I gave the money to her [home worker] and she has to go to... [...] So, and it happens that they charge you an interests rate [...] so I'll go now that I have free time, with this I will go and I will solve this issue, because a friend told me, this friend told me 'you know that they don't sign you in', social services don't sign you in, but I have all the emails I sent, everything, so...

*I: So this friend, she knows about this topic or is she a lawyer?*

P: She worked, no, she works at the labour inspectorate...

The referral that friends can make is relevant when the help required involves delicate issues, for instance, information that will be disclosed or the amount of money that will be spent:

[...] before my brother from Talca did that, but not anymore, but now I'm, I want to make all that again, so I asked friends to recommend me people. My cousin too who is an architect made the design... a friend is helping me, to see a handyman who has made some work for him [...]. (Paulina, 65 years old)

*I: And there has been a situation where you have resorted first to a friend, to some particular acquaintance or neighbour before asking for help to your close family?*

Mercedes: Yes.

Danilo: At least we have done it...

Mercedes: To Diego when we first...

Danilo: How is the name of this guy I am telling you, Diego who work at the hospital and everything. When we were ill from this, to him I tell “hey what doctor, what specialist, this and that, where’, where because to know, to unclog the...

Mercedes: coronary...

Danilo: the coronary, we asked him where, ‘what do you think is the best, here and that’, so he said ‘no, no, no, you cannot get lost, J.J. Aguirre that is from the University of Chile’, he said. (Mercedes, 71 years old and Danilo, 65 years old)

From these experiences, there is another way of understanding the bridging quality of friendship ties in the context of old age. As Souza Briggs (2003, p. 2) indicates, bridging ties not only help to access practical resources and information, but also to connect across roles, symbolic interests, and worldviews. In that sense, friendship ties help to address the diversity of personal and professional concerns and interests that are not necessarily shared with family ties. Study participants have different types of friends that connect with different needs, such as recreational, intellectual, professional, and intimate confessions:

Everybody needs, besides having a family, even if it is a nice relationship, but needs having a circle of friends, either labor or social [*friends*]. (Juan, 74 years old)

it’s the case that the family cannot give you, let’s say, the knowledge eh, work-related or cannot give you the possibility of a job, that is what the friends give, that you got to know in that realm [...] they supplement, let’s say, what others cannot give you and that is the knowledge. I tell you for instance, here with him, with Jose, with Fabian, there is a knowledge, even technical, that we have [...]we have the same profession, except Claudio who is a mechanical engineer, no, but eh, Jose, Fabian, and I are commercial engineers, so we form a, there is a relationship, let’s say, that is also a relationship of technical knowledge, that no one of those within the family circle can provide. (Fernando, 66 years old)

Something similar occurred in other realms of life. Some participants preferred, for instance, to share and discuss contested topics, intimate areas of their life, and/or themes of particular interest with their friends. For both men and women, friends occupied a more intimate place in their lives as they give non-judgemental advice and offer an objective perspective when personal problems are shared:

Friend are more objective than the family [...] obviously, and that gives them a point in favor, eh, the family has affection but also subjectivity, that's it, advice is always preventive, are, always useful, the friends, uh, the friends tells you things straight forward. I mean, if you like it good, if you don't good too. (Matias, 60)

... let's see, with these friends I have shared the activism, life and intellectually. My brother is a physician, so he is boring, no, he is a private doctor, well, he can talk about everything, about architecture, theatre, all, but I share affectively in actuality with my family circle, they are, we have, I have a similar cultural matrix, so let's say, we have fundamental agreements. Now, the other friends they are there to share more things, ah, it's more, more, yes more relaxed regarding the things that are at play in the family. That is more complicated, the friends are more, one has the freedom, one has chosen them, and has chosen them again, plus in general I have long histories with everybody [...] I share my affect with them all but of course, they have more political dimensions, more cultural, eh, and complicities, let's say, of other kind. (Josefina, 74 years old)

[...] but the trust, the intimacy, sometimes the family does not talk truly, but they talk socially and that is boring for me, the 'small talk' ... That thing of talking for the sake of it, I... so, the friends you can also talk for the sake of it for a moment, but then you can talk, so I like it when people show themselves authentic, and that cannot be found always in the family, is like, that routine gets set and you cannot go further... so that for me is frustrating, is like a frustration, and that does not happen with friends, except with the friendship relations that are dying, are deteriorated, that you get frustrated [...]. (Loreto, 64 years old)

Taking into account the type of perspectives and advice that friends offer compared with family members, we can understand the preference for friends as a source of emotional support, providing counsel regarding important issues. Friends also offer an outsider's perspective when study participants face problems within their families. For both men and women friends are among the preferred ties to resort for support in case of family issues; 31% of women have resorted to friends in these cases, being friends the second preferred source of support after close family members (54%). Men share their preference between household members, close family members, and friends, each one with 21%.

From the perspective of the participants, friends offer leeway (“a broad sleeve”) that allows sharing intimate insights that cannot be shared with family members:

There are things you cannot talk and you share the, only with friends. Things that in... you don't tell normally, you are not going to tell. (Emilio, 71 years old)

Not all things can be talked with the family, because it's bounded, it's conditioned, freedom gets in the middle. So, with more reason, if there is affinity in what we are talking, just as you search a specialist in health, also one has to know who to resort... As I was telling you, I among therapist friends that I have, we tell our health problems and help one each other, we exchange therapies, but I have friends who are accountants-auditors, economist, that are topics that I like too and we meet to talk about that. (Juan, 74 years old)

Friends are the preferred source of advice when unbiased and straightforward opinions that cannot be provided by family members due to the specific topic under discussion and/or for being the family members too closely involved in the problem. That is the case of certain life transitions, such as divorce or separation. For instance, Luciana (62 years old) explains that she has a very close relationship with her daughter and son, and they usually share intimate topics. However, when she decided to divorce, she preferred to channel the emotional problems associated with that process with different people:

Sure, all the divorce situation I didn't resort to my daughter, because she was also affected [...] and there my son, with my son, like we live that together, with them we were very... we contained each other until we could, because he also had a process, like fear, anger and... but there my friends, my work, my friends and my work were therapeutic.

Another reason for preferring friends over family members to discuss certain types of personal and family problems is based on the avoidance of conflicting topics and situations. Because family is given for life, there are more opportunities for frequent meeting (e.g. holidays, birthdays, family lunch) and therefore maintaining a conflict-free relationship is of central importance. More about this issue is discussed below.

### 3.4.3. Family as bonding and bridging ties

Family ties are usually regarded as strong ties and bonding social capital, as family is composed of people of similar background and socio-demographic characteristics. However, as Julia's quote showed in a previous section, the 'given' quality of family members does not imply that they would be similar to one's interests and lifestyles, nor they would be necessarily the closest and preferred ties to get emotional support. The previous sections showed that it is for this reason that friends add variety in older people's network. Friends also act as bridges that connect the older person with different lifestyles, as well as advice on issues that are not connected, or should not be discussed, with close family members. Thus, friends not only give practical help and information but also variety of topics and experiences to draw upon when advice is needed. Of course, family members share a common background with the older person, particularly those of the nuclear family. However, the preference of family ties for certain types of help has to do sometimes more with their availability than with the emotional closeness among relatives:

Let's say in case of a medical emergency, I was alone in Santiago at that moment so I called my brother, because my children and my partner were out of town. I called my brother, but... mainly my brother, my partner, my children, yes [...]. (Alma, 60 years old)

I: And in those situations, to understand how it Works, who do you think that people, for instance from your close family, resort to you for some types of help, such as in case of an emergency?

Patricio: Let's see, because we have quite a bit of communication with the members, eh, I'm seeing them daily, every day I see them. (Patricio, 60 years old)

Thus, for everyday help or urgent unexpected issues, the participants ask the people who live close to them or have the possibility to reach them quickly. Close family (i.e.

children, spouse, and siblings) members are the preferred source of support in case of an emergency or when they themselves face or a household member faces health issues; 50% of women and 36% of men have received help from close family members when facing health issues, and 46% of women and 36% of men have received support from close family members in emergency situations. A total of 23 study participants have co-resident children and 20 live with their spouse or partner. One person who does not have co-resident children has co-resident adult grandchildren. These household members had provided help in response to health issues to 31% of women and 36% of men, and to 42% of women and 21% of men in cases of an emergency. In the provision of emotional support, family members are in daily communication with the study participants; 50% of women and 64% of men rely on household members for daily interaction, and 38% of women and 14% of men rely on close family members.

The preferred ties to ask for or receive help are similar for both men and women, who mention spouses, and children. However, we can find gender differences as women, but not men, also include friends among the preferred ties for support. In the case of men, they prefer resorting to close family members due to their physical proximity and because family members are able to perceive when they need help without needing an explicit request or further explanation. As mentioned in the section on the issue of help, reciprocity also plays a role in the reception of support, as an unspoken reciprocity norm enables men to get help without the need to asking for it.

There is not only a preference for certain ties to receive or ask for help depending on the type of support needed, but also some situations are more problematic than others,

particularly asking for economic help or care related support. Regarding the latter, a tension exists when ties with close people need to be used. On one hand, close ties, such as children, are preferred due to their availability as well as the possibility of receiving help even without asking for it. On the other hand, the notion of not being a burden usually applies to the relationship between the study participants and their children.

Literature on social capital indicates that family members are among the main sources of bonding social capital, being especially suited to provide care and functional help (Gray, 2008; Phillipson, 2013; Sheets et al., 2005). However, the aforementioned tension put into question how suitable some bonding ties are to provide certain kind of help. The experiences of study participants regarding close family ties and provision of help indicate that the physical and emotional closeness between older people and some family members, particularly children and spouses, facilitate the reception of support. However, the study participants are at the same time reluctant to compromise their own and their children's independence. In that sense, the bonding social capital present in close family ties is, from study participants' experiences, best suited to get support with daily practical things and emergencies.

Despite the latter, some participants do seek assistance from their children for economic help and to solve family problems. These participants are in general more family oriented and with smaller networks of close friends than other interviewees. They also seem more reserved about their personal problems and prefer to discuss them with their close family circle:

*I: Have you received any kind of help in case of a family issue, or you have solved that by yourself, or you help each other?*

Marisol: We help each other; dirty laundry is washed at home...

*I: And has anyone helped you in case of an emergency, something urgent?*

Marisol: Yes, of course... [...] Lisa, the youngest one [...] let's see, first of all monetary, she is the one who helps me monetarily, and... I help her sometimes with the children [...] (Marisol, 73 years old).

[...] I get along better with the girls, the girls, the ones when one has a problem I tell them, but with other people no, even the uncles, they are far and they are old so what are they going to give me [...]. (Cristian 73)

I believe that it is to not complicate others' existence, so we sit at the table every day, we meet around 8 pm, my daughter arrives from the university, my wife from her work, and there we always have something to talk, and we open up, we always talk at the table and it has always been like that. We have never exteriorized our problems. (Patricio, 60 years old)

Issues of boundaries can be found in the account of study participants, both men and women. Some of the characteristics used to describe the difference between friendship and family relations have in common the belief that some aspects of life cannot be shared with family members or with friends. In the case of family, whether a person likes it or not, the connection is continuous. Even when the relation with a specific family member has deteriorated, chances are that that member will be present in a family gathering. Also, there are some relationships that are worth keeping in good shape or at least neutral because their deterioration may imply distancing from a loved one. Marisol (73 years old) mentions how she prefers not to get involved in issues related to raising his grandson to avoid problems with her daughter:

It's a very difficult kid [*grandson*], very, very [...] he makes me nervous, very nervous because the kid is, he's not spoiled [...] he has no hierarchy, he doesn't consider you, he is like me, me, me, everything. He gets tantrums, is, he can tell you any bad word, he can tell you anything, so he needs a lot of contention, you know? So I don't, if I want to get involved because 'look this brat, this and that', so I don't want to have problems with her [*daughter*]...

Lorena (65 years old) takes a similar stance in her relationship with her son-in-law:

Javier [*son-in-law*] is not a bad person, he is childish though, very childish, but I say one thing, well if I see them fine it's OK. I close my eyes and look to other place, and they manage as they want but, I don't, well, in every married couple, I don't get involved. If I can help in what I can, but getting involved in their discussions, their problems, that's their problem [...]

Situation as the ones described by Marisol and Lorena shed light on the complex and sometimes negative aspects of bonding relationships, which health effects have been studied by different scholars (Ferlander, 2007; Murayama et al., 2013).

So far, I have described the bonding properties of family ties. As the quotes of Danilo, Rosa and Emilio indicated in the first part of this result section, emotionally close family members are attentive to their needs. This closeness facilitates the natural exchange of certain kinds of support, allowing participants to receive help without feeling that they have acquired a debt that must be repaid. In that sense, certain family ties, particularly children and spouse, can be regarded as bonding ties based on tight bonds of trust and reciprocity (to the point of making reciprocity invisible) and shared values.

Nonetheless, family ties can also be analyzed as playing a bridging role in older people's personal networks. Although Lancee (2010) indicates that bridging ties imply a crosscutting network of thin trust, Ferlander (2007) observed that some family members, regarded by the participants as emotionally close ties, can act as bridging ties, for instances in terms of gender and age. From the experiences of the study participants we can observe that family members are an important source of counsel, as well as helpful ties to access information and services. Here, the bridging quality of children has to do with their age, but not only in terms of connecting different generations within the family, but also because they

link the older person to public spheres of life from which they are more distanced after retirement.

Although friends are the preferred ties when advice about work issues is needed, close family members are also important with 12% of women and 21% of men indicating that they have asked for or received help from close family members on work-related issues. Similarly, close family members are central when help with legal paperwork is required, with 27% of women and 29% of men resorting to these ties. Some study participants mentioned that they have children and siblings who are lawyers or are acquainted with legal issues, which make them a preferred source of support to provide or connect with a service:

Recently no, because I have not needed [*help with legal issues*], but when my husband passed away yes, there, my brother who is a lawyer and everybody, they did the inheritance paperwork<sup>17</sup>, this brother-in-law did it too [...]. (Rosa, 74 years old)

Well, now, recently I was hospitalized, and a friend of my daughter, who is a professional of that field, came to take care of me. She cares for elderly people and has taken some courses at the University where she studied (Susana, 73 years old).

The professional knowledge and position of close relatives was also relevant to accessing services. One study participant, Julio (66 years old) talks about this:

[...] I had some support from my brother because, because he was a worker at the hospital J. Aguirre, so is like, like the contacts there [...] no economic [*problem*], but only making the contacts, in the case, to get me a doctor [...]

Similarly, Lorena (65 years old) mentions how the fact of having her daughter working at a primary health service helps her to have a better quality medical attention:

Trust in primary care centres, well, my daughter works in a public clinic, so that you can trust but, they don't treat me bad

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<sup>17</sup> She actually says “posesión efectiva”, which is a legal procedure to dispose of the assets and debts of a deceased person.

Interestingly, Lorena makes reference to the role that having her daughter working at the public clinic plays in enhancing her own experience using that service. Due to that, Lorena also mentions that she, recognizing her advantage, can trust in public clinics. Bonding ties that act as bridges to access certain services are particularly important in context of low institutional trust; such is the case of Chile. The connection of these findings with the literature is further elaborated in the discussion section.

### **3.5. Discussion**

The experiences of this particular group of Chilean older men and women were summarized in three analytical themes that enabled us to explore the function of friends and family ties and the circumstances under which friends and family ties are selected to exchange particular kinds of emotional and practical help. In general, the results indicate that friends and family ties play a double role as bonding and bridging ties depending on the situation. However, an interesting finding was that friends, in comparison to family ties, represent a different type of bridge that connects with specific interests and broader identities of the older person. In that sense, friendship ties add variety to the study participants' networks, not only in term of practical resources, but also emotionally. In fact, the interviewees have different types of friends that support them in different forms, e.g. with recreation, counsel on family and intimate issues, and professional advice.

The latter finding is in line with perspectives that understand social capital as a resource that helps bridging across roles, identities, worldviews and symbolic interests (de Souza Briggs, 2003; Putnam, 2000). Our findings corroborate those of others research

indicating that relationships with family and friends work differently. Both types of ties provide emotional support, but family relations play a more prominent role in providing practical support, while friends provide companionship, reaffirmation of self-regard, resilience, and social integration (Huxhold, Miche, & Schüz, 2014; Messeri, Silverstein, & Litwak, 1993; Wiles, Wild, Kerse, & Allen, 2012). In addition to the bridging qualities of friendship ties, the study findings show that friends also support with help usually attributed to bonding ties, as they constitute an important source of help for something as key as assisting in case of an emergency and as providers of emotional support.

It was stated when reviewing the different definitions of social capital that the mobilization of resources embedded in the networks of relationships is not necessarily a rational calculated action. In fact, as Bourdieu (1986) and Small (2010) state that, the underlying objectives or the strategies used by individuals are not necessarily consciously pursued. Our results regarding altruistic forms of help show that the latter is even more so at the level of family relationships and it is perhaps one of the more characteristic features of family members when used in their quality of bonding ties. In fact, our study findings show that reciprocity is not necessarily an expected outcome of exchanging help. The experiences shared by Danilo, Rosa and Emilio showed that practical help exchanged among emotionally close family members acquires a natural quality, which is not the same as saying that this help is taken for granted nor it is anticipated based on a notion of debt. Indeed, exchange of help in these cases flows without the need of asking for it and even without expecting any specific form of support.

Regarding the latter, chapter 4 shows how study participants are against normative (mandatory) forms of family obligation. In addition, the findings of the current chapter show in some cases the type of *negotiated reciprocity* (Boneham & Sixsmith, 2006) where parents have to be persuaded by their children to accept support. What we observe in our findings is that bonding social capital, particularly that present in family ties, enables mobilization of resources based on an unspoken rule of reciprocity. This rule is similar to the notion of *generalized reciprocity*, defined as an altruistic form of help in which the time, quantity, or quality of the expected return is indefinite (Sahlins, 1972; Swartz, 2009). Obtaining support in this manner results more comfortable for those people who value their autonomy and/or want to protect their privacy. The findings show that particularly older men depend more on this type of reciprocity to access and mobilize resources.

The importance of having social capital with bonding and bridging qualities had been stated by Putnam (2000) when mentioning their importance to “getting by” and “getting ahead”. The aforementioned findings can be connected with other studies have supported the importance of both types of social capital indicating that dense social networks are not always beneficial in late life or might be not always appealing to older people (Cornwell, 2011; Ferlander, 2007; Murayama et al., 2013). Cornwell (2011) indicates that maintaining autonomy and privacy can be problematic in dense networks. According to this author, older people value their independence so receiving excessive support causes feeling of vulnerability, decreases self-esteem, and emotional distress. The latter creates a tension between the value given by older people to being independent and the benefits that dense

networks have in terms of care and support (Cornwell, 2011, p. 783). Interestingly, this tension, discussed in chapter 3, is also present in the study participants.

Both bridging and bonding social capital are important not only to give access to diverse kinds of resources. As observed by Victor, Scambler, and Bond (2009), personal ties not only represent a source of potential resources to face crisis or emergencies, but also are relevant by themselves. Personal ties help to reconcile autonomy and interdependence (Phillipson, 2013), by providing support and a sense of belonging, while enabling people to construct and negotiate their social identities. The latter is essential when considering the importance of the resources embedded in older people's networks, as they are not only relevant to provide instrumental help but also, and particularly, to give affective support and counsel. In that sense, bridging ties, and specifically friends acting as such, are central to get ahead when facing important changes. In line with Phillipson's (2013) statement, our findings show that the outward looking character of friendship ties enables the study participants to deal with life transitions, so that they can get emotional help in areas and situations that are difficult to address with family members. That was the case of Luciana when dealing with the process of divorce. Not surprisingly, research has shown that the role of friends as providers of emotional support and trusted confidants is central for the psychological wellbeing of the older person (Huxhold et al., 2014; Takahashi et al., 1997). The latter means that even in those cases where health issues can complicate the exchange of instrumental help, friends are still a central resource to ensure the wellbeing of older people.

The role of friends and family ties (siblings and children) as bridges to access prompt and better services is connected with issues of trust. Leonard and Onyx (2003) found that people are more willing to take risks to access other networks for information and resources when they used trusted intermediaries. In that sense, family members and friends are far from being a crosscutting network of thin trust, in the sense of bridging ties as conceptualized by Lancee (2010). In the case of this group of Chilean interviewees, friends and family members represent trusted intermediaries who improve older people's chances to access the right professional or to get better public services, while reducing concerns of being over charged or not being considered as a priority client or beneficiary. This finding should be understood as part of a major context, as in Chile the levels of institutional and generalized trust are low (ICSO, 2014; Latinobarometro, 2013). In such a scenario, older individuals rarely would resort to people and organizations that are completely disconnected from their strong ties, which explain the importance of using family members and friends as bridges.

The way in which the analysis has been conducted makes it difficult to establish clear gender differences. Attention was paid to how older people mobilized the resources embedded in their personal networks. In that sense, the logic and process used by older men and women are similar. However, the bridging potential of their networks is different. Chapter 2 discussed the gender difference in size and composition of older people's personal networks (in the form of personal communities), indicating that women have bigger and more diverse networks, which also include more friends, than men. The resource generator offers similar results, with women exchanging more types of help with more diverse kind of

people than men. According to Cornwell (2011), these type of network structures would increase the bridging potential of women's networks. When analyzing the instances mentioned by study participants where they mobilized bridging social capital, we find that similar proportion of men (36%) and women (31%) have received help by using bridging ties. However, in actuality more proportion of women (31%) than men (14%) have acted as bridges to help family, friends and even acquaintances, most of the times linking unconnected ties (i.e. kin with non-kin). In this manner, Cornwell 's (2011) statement seems to apply to the case of this particular group of Chilean older people. According to Cornwell (2011) socio-emotional selectivity theory could explain the bridging potential of older women's networks in contrast to older men's. Older men's networks become more emotionally oriented as they grow old, focusing more on strong rewarding relationships that provide emotionally fulfilment (Cornwell, 2011, p. 791). Our findings offer only a snapshot of a particular group of Chilean older people. More research is needed to identify how bonding and bridging ties change over time and may differ in men and women as people face different life stages and transitions..

### **3.6. Conclusion Chapter 3**

This chapter aimed to examine the relationships that were relevant to older people through an analysis of their bridging and bonding social capital relationships. The experiences of this particular group of Chilean older men and women enabled us to research into the circumstances under which some specific types of ties are selected to get particular kinds of emotional and practical help, and how under certain circumstances bonding ties can also act as bridging ties.

In the case of this particular group of Chilean older people, both family and friends, usually perceived as emotionally close ties by the older person, act as bridging and bonding ties. As bonding ties, they represent trustworthy people with whom help exchange is less problematic due to an unspoken rule of reciprocity and shared values that allow helping one another without the need of asking for it aloud. If we consider their function, family ties represent a different form of bonding social capital. Family members appear as the preferred source of practical help due to their availability (geographical closeness and continuity of meeting). Friends, on the other hand, are usually described as people with whom participants share a history, values and/or interest. This gives to friends a specialized knowledge of study participants' needs and likes, facilitating the exchange of support.

Both friends and family members—including the older person— act as bridging ties when specific skills and knowledge are needed. This shows that bridging qualities can be a property of similar people, as friends and family members connect gaps in information (R. Leonard & Onyx, 2003; Widmer, 2006) as well as benefit the older person by helping them to access professional advice and specific services. As observed by Leonard and Onyx (2003), children bridge across structural categories in terms of age. Here, nonetheless, they not only bridge an older generation with a younger one. Children also link people connected to public spheres of life through work and active professional engagement, with those who have willingly or unwillingly withdrawn from those spheres due to retirement or a preference to be more actively involved in domestic issues.

The findings of this study have conceptual relevance. In line with other studies conducted in family and community settings (Ferlander, 2007; R. Leonard & Onyx, 2003), the

experiences of the study participants showed that bonding and bridging social capital were present in strong ties (close family members and friends). Although, the distinction of both types of social capital is important, the findings indicate that we cannot assume that in late life strong ties are more important or useful than loose ones or vice versa. Also, when attending to social capital in late life, the findings indicate that bridging ties can connect people in different ways. The way in which family ties and friends connect older people with different areas of need and interests is a good example of this.

Similarly, it cannot be assumed that the help exchanged with family member and friends is of the same type or is signified as equivalent. As an example, trust works differently in older people's relationships with family and friendship ties. Older people share an important part of their lives, resources and emotion with emotionally close family members but, due to continuous encounters and interaction, these ties are unsuited for sharing intimate issues or family problems. It is in those circumstances when friends appear as more suitable options for emotional support. Thus, methodologically, it is important to avoid grouping family members and friends within the same category of 'strong' ties. It is the interplay of their specific qualities and functions what makes them more or less beneficial for older people, giving them access to a variety of material, practical, and emotional resources.

Although this cross-sectional study does not track changes in the type and sources of support across the life of the participants, it provides a starting point to explore how people perceive and feel about different ties at different life stages. In that sense, this study makes a contribution to the social capital literature by adding a life course perspective to better

understand the importance and differences of ties described as close in their role of bonding and bridging social capital relationships.

**Table 5: Emotional support received by participants**

<b>Type of emotional support</b>	<b>Ties</b>	<b>Women (%)</b>	<b>Men (%)</b>
<b>Counsel on important issues</b>	Household members	35	14
	Close family	35	21
	Other relatives	12	0
	Neighbours	4	0
	Friends	42	36
	Organizations	4	0
	Other	12	7
<b>Counsel on work</b>	Household members	12	0
	Close family	12	21
	Other relatives	4	7
	Neighbours	0	0
	Friends	31	36
	Organizations	12	7
	Other	4	7
<b>Daily talk</b>	Household members	50	64
	Close family	38	14
	Other relatives	19	7
	Neighbours	4	0
	Friends	42	29
	Organizations	0	0
	Other	0	7
<b>Information on recreation</b>	Household members	8	7
	Close family	8	7
	Other relatives	4	7
	Neighbours	4	14
	Friends	35	14
	Organizations	35	29
	Other	19	14
<b>Support in family issues</b>	Household members	19	21
	Close family	54	21
	Other relatives	15	7
	Neighbours	0	0
	Friends	31	21
	Organizations	0	7
	Other	15	7
<b>Company to events</b>	Household members	23	29
	Close family	38	21
	Other relatives	12	14
	Neighbours	4	7
	Friends	42	29
	Organizations	4	0
	Other	4	0

**Table 6: Practical support received by participants**

<b>Type of practical support</b>	<b>Ties</b>	<b>Women (%)</b>	<b>Men (%)</b>
<b>Health issue</b>	Household members	31	36
	Close family	50	36
	Other relatives	12	0
	Neighbours	4	7
	Friends	19	0
	Organizations	12	0
	Other	15	7
<b>House chores</b>	Household members	38	29
	Close family	27	14
	Other relatives	19	7
	Neighbours	4	0
	Friends	12	0
	Organizations	8	0
	Other	15	14
<b>Computer use</b>	Household members	38	21
	Close family	38	21
	Other relatives	15	21
	Neighbours	4	0
	Friends	8	14
	Organizations	8	14
	Other	12	21
<b>Legal paperwork</b>	Household members	8	7
	Close family	27	29
	Other relatives	12	0
	Neighbours	0	0
	Friends	27	43
	Organizations	19	7
	Other	8	21
<b>Transportation (including accompanying to a place)</b>	Household members	35	21
	Close family	19	36
	Other relatives	4	7
	Neighbours	4	0
	Friends	38	7
	Organizations	0	0
	Other	8	0
<b>Emergency</b>	Household members	42	21
	Close family	46	36
	Other relatives	23	14
	Neighbours	8	21
	Friends	35	14
	Organizations	8	0
	Other	15	7
<b>Watch house while away</b>	Household members	23	14
	Close family	31	29
	Other relatives	4	21
	Neighbours	23	36
	Friends	8	0
	Organizations	4	0
	Other	19	14

Type of practical support	Ties	Women (%)	Men (%)
<b>Little economic help</b> (up to Ch\$ 50,000 or US\$ 85)	Household members	35	21
	Close family	42	21
	Other relatives	23	0
	Neighbours	12	0
	Friends	12	7
	Organizations	0	0
	Other	4	0
<b>Greater economic help</b>	Household members	12	7
	Close family	38	14
	Other relatives	12	7
	Neighbours	4	0
	Friends	15	0
	Organizations	15	14
	Other	0	7

#### **4. Public policy and experiences of aging: social relationships and social integration in Chilean policy on aging**

[...] the older adults themselves, and the society in general, ought to take charge of their aging process. Each one of us is responsible for our life and, consequently, of the way in which we decide to live this stage. (Rosa Kornfeld, former director of SENAMA<sup>18</sup>)

##### **4.1. Introduction**

Whereas developed countries experienced a gradual population aging and had many decades to adapt, the majority of developing countries are experiencing, or are projected to experience, a more rapid transformation of their age structures. This means that developing countries, such as Chile, have less time to adjust to the consequences of this change and they will have to deal with the challenges and requirements of an aging population while facing other persistent social problems that require attention and resources (Higo & Williamson, 2011). In fact, according to a report edited by the Chilean researcher Sandra Huenchuan for ECLAC (2009), the Latin American aging process raises concern for being faster than the process experienced by developed countries, and occurring in a more vulnerable context. Huenchuan argues that Latin America presents persistent inequality, weak institutional frameworks development, welfare systems with low coverage and quality, as well as a family institution burdened by obligations regarding the safety and protection of its members.

Acknowledging the challenges of an aging population, the Chilean government developed a formal institutional framework to address the needs of Chile's older population. This started with the creation in 1995 of the National Commission for Older Adults (CNAM)

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<sup>18</sup> Speech during the presentation of the *Integral Policy for Positive Aging 2012-2025* (Ministerio de Desarrollo Social, 2012)

and was broadened in its areas of action in 2012 when the CNAM became the National Service for Older People (SENAMA). The areas of institutional concern of SENAMA currently include economic security, health, quality of life, and autonomy of elderly people (Calvo, 2013). In 2012 SENAMA presented a document called *Integral Policy for Positive Aging (2012-2025)* that recognized the need of a comprehensive understanding of the aging process and later life by offering a series of guidelines to develop programs and services directed to an increasing older population.

The purpose of this chapter is to examine what forms of social integration are fostered by Chilean policy on aging in comparison to the ideas and practices relative to personal relationships and social integration perceived by older Chilean people. In this chapter, the concept of social integration is understood as older people's network of social connections and participation in meaningful roles (Pillemer, 2000, p. 8). Based on Scharf's (1998) distinction between integration through formal and informal relationships, the forms of social integration explored in this chapter are: social integration using formal relationships, e.g. participation in the labour market, and social integration through informal relationships, represented by family and friendship networks. The policy analysis also examines to what extent the nature and quality of contacts with family members, friends and other relevant ties are considered and supported by current Chilean policy on aging.

I have taken the document of the *Integral Policy for Positive Aging (2012-2025)* as the basis for my analysis because it represents the state's understanding of the challenges of an aging society and the role of different actors (public, private, families, and individuals) in

facing those challenges. At the same time, public policies represent discourses of a specific context and historical time that suggest standards, modes of understanding of old age and the experiences associated with growing old (Grenier, 2012; Laliberte Rudman, 2006). The analysis of the specific policy document is compared and contrasted with the result of 40 qualitative interviews conducted with Chilean people between 60 and 75 years old. In examining the different forms of social integration, special attention is paid to whether the diverse types of personal relationships relevant to older people's lives are recognized and supported by policy definitions and programs.

#### **4.2. Public policy and experiences of aging**

Literature on the political economy of aging stresses the role of social structures in the construction of old age (Estes & Phillipson, 2002; Phillipson, 2005; Walker, 2006). This approach understands old age and its problems as socially produced. Attention is paid to the role of public policy and the welfare state in shaping the 'reality' of aging and old age, as that context presents opportunities and exerts pressures and constraints that influence the experiences of growing old (Biggs, 2001; Phillipson, 2005).

Public policy can also be understood from a more cultural perspective. Here, the influence of policy on the experiences of aging is also recognized, but at the same time policy itself is seen as a socio-cultural product. As Grenier (2012, p. 64) states "policy solidifies a consensus of the day into practice". In that sense, public policy is a reflection of the time and particular socio-cultural context in which it was developed and implemented. According to Kraft and Furlong (2012, p. 4), public policy is "a course of government action or inaction in

response to public problems” that represents the most important values of a society and reflects which of many different values have the highest priority for appropriate courses of action.

In a similar fashion, Oszlack and O’Donnell (1995, pp. 112–113) define public policy as “a set of actions and omissions that represent a determined form of state intervention in relationship to an issue that arouses the attention, interest or mobilization of other social actors”. These authors state that a normative orientation can be inferred from policies; orientations that are expected to influence the course of the social process previously developed around a specific issue. Thus, public policies can determine with the force of law what social values –sometimes conflicting social values– will prevail. As a result, policies can influence people’s lives since policy definitions and practices create typified constructs, in the phenomenological sense, that influence social and individual interpretations of the experiences of growing old (Grenier, 2012).

#### **4.2.1. Public policies, social integration and social relationships in late life**

In relationship to the aging population, few studies have analyzed how social policies help or hinder the social integration of older people, and those scholars who have addressed this issue have done it analyzing the policies and evidence of developed countries (Biggs, 2005; Biggs & Powell, 2003; Reichert & Phillips, 2009; Scharf, 1998). Therefore, the role of public policy in fostering social integration of older people living in developing countries remains largely understudied.

Among the available literature, we can distinguish two broad categories of studies regarding the influence of public policies in the ways in which older people are integrated in society through, for instance, public and private organizations, and their personal networks. The first category of studies compares and contrasts socio-demographic data with existent aging and family policy or with policy debates. Some research within the first group of studies identifies areas for policy debates by investigating the changes in the generational contract and its effects on family solidarity to analyze whether social policy can strengthen family solidarity to avoid the “war of generations”. Examining British and German policy, Reichert and Phillips (2009) address issues such as: whether the welfare orientation of the Policy addresses individual needs or fosters family tradition; to what extent voluntaristic relationships are fostered by policy and whether diverse family structures are recognized; what types of exchange are recognized and promoted by public policy; what policy instances promote intra and intergenerational solidarity; how are independence and care addressed by public policy, and, what measures are available to promote inclusion and prevent discrimination of older people.

We can also classify the work of Scharf (1998) within this group of studies. Scharf (1998) analyzes the role of German social policy in promoting or hindering older people’s social integration, contrasting social policy focus with data on formal and informal relationships, quality of contacts, and feelings of loneliness and isolation in late life. In this manner, the author assesses whether public policies guarantee social integration of older people or act as a source of exclusion.

The second category does a similar analysis but taking a narrative approach to analyze public policy. Here, public policy is understood as a meaning frame that influences individuals' interpretations and practices. Biggs and Powell (2003, p. 116) state: "policies provide narrative templates within which certain categories of person or groups are encouraged to live out their lives". In that sense, the issue is how policies legitimate certain identities by creating social spaces and providing the materials for the enactment of those identities.

This chapter is situated in the second category of studies, as it uses a narrative approach to compare and contrast older people's experiences with the definitions and actions of Chilean policy on aging. However, the insights offered by the first group of studies are also relevant due to the topics under study, which help to specify primary and secondary questions used to guide the analysis of the Policy document. This analysis was summarized in four themes: 'tone' of the policy, different instances of integration for dependent and independent people, definitions of autonomy and self-management, and the Policy's assumptions of family responsibilities and involvement in older people's support. These primary and secondary questions and their relationship with the themes are better addressed in the methodology section.

#### **4.2.2. Policy as a frame of meaning**

According to Clark (1993, p. 13), public policy can be defined as "the attempt to balance competing notions of the responsibility of individuals, families, and the state in developing programs to meet human needs". The author argues that every policy

perspective, statement or recommendation represents a story or sub-story within the broader narrative discourse about a gripping policy problem (Clark, 2011, p. 84). Policies can be also defined as selections of reality based on specific frames that select out some parts of reality while leaving others out (Fischer, 2003, p. 144). Empirical facts and values influence the definition of a public policy problem and, at the same time, the relationship between the value and fact dimension shapes the solution of the problem. Clark (2011, p. 85) states: “The value dimension represents cherished principles or beliefs that are affected in some way by the empirical state of affairs”.

Focusing on the United Kingdom, Biggs and Powell (2003) used a narrative approach to analyze the rhetoric and representation of the relationship between family and older people in social policy. The authors compared neoliberal and social democratic family policy to stress the ideological continuities and discontinuities present in such policies. Biggs and Powell (2003, pp. 103–119) highlighted the contradictory narratives present in these policies. Neoliberal policies represented two contradictory ideas of family and its relationship with older people. On one hand, policies represented family as independent from the government, as a realm of care supported by traditional family values. On the other hand, neoliberal policies depicted family as a context where obligation toward older members was avoided, resulting in their mistreatment. Thus, greater surveillance from the government was required.

Biggs and Powell (2003) also observed that the subsequent social democratic policies changed the focus toward older people, who were depicted as active citizens who should be encouraged to participate in and contribute to society as producers and consumers.

However, social policy contained conflictive narratives. On one hand, social policy included an implied hedonism of aging lifestyles based on consumption and productivity. On the other hand, the policy discourse and actions assumed that older people can actively, and willingly, participate in society through grandparenting. Despite the differences in focus, the narratives of both periods of policies had a common strand, which allowed them to coexist. In liberal family policies, the focus was not on the aging individuals, but on family and government responsibilities toward them. Then, in the social democratic period, Biggs and Powell (2003) found that the narrative of active citizens gave older people a secondary status, as their contribution benefited other players who were central to society. In that way, both policies masked the “authentic tasks of aging” (Biggs & Powell, 2003, p. 114).

Grenier (2012) also used a narrative approach to analyze the way in which life transitions and old age were represented in social policies from the United Kingdom and Canada. The author found two competing discourses on aging, one that focused on its biomedical or functional features, and other emphasizing its healthy, productive, and social aspects. These discourses overlapped in the structures and practices related to health and illness, though they gave conflicting messages. On one hand, older people were instructed on healthy and successful aging while, on the other hand, unavoidable loss of autonomy in old age is contained in policy discourse. In that way, policy on aging had two polarized targeted populations, the younger and healthy older people defined as the ‘third age’, and those who are older and affected by illnesses –usually classified as forming the ‘fourth age’. Grenier also indicated that successful models of aging integrated in policy definitions directed efforts

toward prevention of illness and chronic conditions, focusing more on changing individuals' behavior and lifestyles rather than the social conditions affecting them.

Common to the analysis conducted by Biggs and Powell (2003) and Grenier (2012) is the focus on assumptions informing policy definitions and areas of action, as well as the taken for granted experiences of their targeted population. Both studies also compared the policy discourse and associated actions with the available evidence of older people's practices and expectations. The identification of taken for granted definitions and experiences of aging is a key starting point for examining how social integration in late life is constructed by Chilean policy on aging. This enables us to recognize to what extent the templates provided by the Policy regarding formal and informal means of social integration are similar to older Chilean people's experiences and ideas of social integration.

### **4.3. Methodology**

The document *Integral Policy for Positive Aging 2012-2025* was analyzed using an interpretative narrative approach that focuses on the expressions of social meaning present in policies, such as beliefs and values that motivate specific policy definitions and actions. According to Fischer (2003, p. 142), an interpretive approach to policy inquiry examines the processes through which the policy meanings are transmitted, the intended audience of those meanings, and the interpretations of the readers. The analysis also seeks to make visible the conflicting frames informing policy narratives and marginalized stories (Fischer, 2003; Grenier, 2012). The recognition of the context in which policies are formulated is also an important part of narrative analysis. According to Riessman (2008, p. 8), "storytelling

occurs at a historical moment with its circulating discourses”. Similarly, Fischer (2003, p. 146) argues that policy issues arise in contexts that are part of broader political and economic setting, which are located in a specific historical time.

Despite the latter definitions of what a narrative analysis of social policies should include, there are few models of analysis to be followed. In general, the authors mentioned in the previous section directly state the policy issues, with no clear reference to the sources analyzed or clear description of the steps followed for the analysis. One of the few exceptions is s the work of Grenier (2012) analyzing life transitions. In many aspects, the analysis I conducted is based on her work, where the author analyzed the gaps between macro constructions of life transitions and the actual experiences of people.

The analysis conducted on Chilean policy on aging was framed by three primary questions (first column of table 7) that addressed the definitions, practices, assumptions and unexpressed topics and issues regarding social relationships and social integrations in late life (Biggs & Powell, 2003; Grenier, 2012). For each primary question, secondary questions were added to examine specific topics (second column of table 7). These secondary questions are grounded on the available literature. More specifically, they are based on the emergent trends and issues identified by Reichert and Phillips (2009) in their analysis of policy debates. By asking primary and secondary questions, I seek to comprehend the Policy. With this method I aim to have a better understanding of the content and discourse of the Policy. Similar to how a researcher conducts an interview using guiding questions and follow-up questions when necessary, the secondary questions —grounded in previous studies— are

used to anticipate areas of analysis connected with the research question. The secondary questions may or may not be answered from the content of the Policy, although they help as a guide for the analysis. This analysis is summarized in the four themes previously mentioned, which address some of the areas examined through the secondary questions.

The first theme (the 'tone' of the policy) arises from the analysis guided by the primary question A. Primary question B guides the analysis that gives rise to the other three themes regarding instances of integration for dependent and independent people, definitions of autonomy and self-management, and policy's assumptions of family responsibilities and involvement in older people's support. Primary question C allows a higher level analysis that crosses the four themes, as it is concerned with the policy assumptions and the tensions that arise from those assumptions. In that sense, primary question C is relevant not only to analyze the content of the Policy document but particularly to acknowledge the tensions between the actual experiences and expectations of older people and the type of late life represented and constructed by the policy definitions and actions (e.g. services and programs).

**Table 7: Primary and secondary questions guiding the analysis of Chilean policy on aging**

Primary questions	Secondary questions
A. How is demographic change and its impact addressed?	<ul style="list-style-type: none"> <li>– What problems are defined and what is the ‘tone’ of that definition (e.g. crisis, challenge, opportunity)?</li> <li>– Are effects of demographic change on personal relationships and availability of care and support addressed?</li> </ul>
B. What is tacitly expressed in the Policy regarding: diversity of relationships in late life, family solidarity, intergenerational contract, isolation, autonomy, support and care, and formal means for social integration?	<ul style="list-style-type: none"> <li>– What means for social integration in late life are recognized and fostered?</li> <li>– Are personal relationships of different type fostered in any way?</li> <li>– How is family defined?</li> <li>– What is the role of family members? Are there specific family relationships fostered by the policy?</li> <li>– Are ‘voluntaristic’ relationships recognized? How are they fostered?</li> <li>– How is personal autonomy and independence addressed?</li> <li>– How is family solidarity included in Policy definitions? How is it fostered? What type of exchange are recognized or promoted?</li> </ul>
C. What is assumed or taken for granted in the policy document regarding the latter issues? What remains unexpressed?	<ul style="list-style-type: none"> <li>– What theoretical frameworks are being used? What are their assumptions? How do they inform policy practices?</li> <li>– Are there conflicting narrative frames? What are the tensions between them?</li> </ul>

The policy analysis started with a thorough reading of the document *Integral Policy for Positive Aging (2012-2025)*. The 122 page document constitutes a framework to guide the actions of different Ministries by outlining a series of measures and programs directed to older people. The first reading of the Policy permitted the selection of relevant threads present in specific sections. The main criterion to select a section was that the content has to be directly connected to the topic of personal relationships in late life (described or defined certain ties) and means for social integration.

The Policy contains three lines of action and thirteen specific objectives, summarized in Table 8. I focused the analysis on ten of the specific objectives, as these were related to the research question and directly involved the participation of older people or their immediate benefit for social integration. In addition, I analyzed the introduction section of the Policy. This consisted of different presentations written by government authorities and

the actual introduction, where relevant data, main definitions and objectives are stated. Other sections where older people were not immediate beneficiaries have not been considered for the analysis; for example, sections about ‘research’, ‘systematization and dissemination of information’, and ‘training of specialists’. Also, the section that describes how the programs will be assessed from a technical point of view was not considered for the analysis.

**Table 8: Summary of lines of action and their corresponding specific objectives of the *Integral Policy for Positive Aging 2012-2025***

Lines of action	Specific Objectives
Healthy aging	Health and care
	Healthy lifestyle
	Specialists
Active aging	Participation
	Education
	Economic security
	Transportation & housing
Positive aging	Abuse
	Access to justice
	Information & dissemination
	Identity
	Research
	Subjective well-being

After the thorough reading of the policy document *significant* codes were created to identify the main definitions and topics of interest discussed in the Policy. Significant codes use researcher’s language to reflect the focus-of-inquiry of the study (King, 2008). The significant codes used in the analysis of the Policy document were based on the sub-questions presented in table 7.

Memos were used during and after the coding process. In qualitative analysis, memos allow comparing data, exploring ideas regarding codes, and directing further data production

(Charmaz, 2006). Memos are useful analytical tools to aid the description and integration of codes. They can be used, for instance, to describe properties of a category, summarize ideas, and link concepts. In short, memos can be defined as “written records of analysis” (Corbin & Strauss, 2008, p. 117) . During the analysis of the Policy document, memos were used to identify the main policy narratives as well as issues of interest due to their connection or disconnection with the emergent trends and problems identified in the literature, and with the issues addressed by the study participants.

Although some thematic analysis was conducted, the main purpose of the codes was to provide a starting point to identify explicit narrative threads. The contrasting and comparison of these explicit narrative threads with the available literature and the experiences of the study participants enabled the identification of assumptions and neglected issues. The interview data used for this comparison were part of a larger study on social capital in late life.

The study participants were men and women between 60 and 74 years old living in the city of Santiago, Chile. The focus on people of the younger generation of older people is relevant because it allows the exploration of the personal relationships of the cohort of baby boomers, a cohort that has not yet been studied in Chile<sup>19</sup>. In addition, this cohort is of great importance for public policies because it would be more effected by the decrease in family size and the potential problems of availability of informal support than previous cohorts studied in Chile.

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<sup>19</sup> Studies using data from the Survey on Health, Well-Being, and Aging (SABE) have analyzed older people’s personal networks. However, it was conducted with people aged 60 years old and older in 2000.

The participants were initially selected from the younger cohort of older people who had participated in a series of focus groups conducted by the Domeyko Program on Aging of the University of Chile in 2008. Only participants who were within the age range of 60 to 75 years old were contacted. Forty-one participants from the Domeyko study had given consent to be reached for future studies. Due to changes in phone number and health problems, only 10 people (7 women and 3 men) out of those 41 could participate. The other thirty participants who formed the study sample were reached through older people's clubs and associations and using the snowball technique.

The interview schedule included open-ended questions adapted from a study on personal communities conducted by Spencer and Pahl (2006) and a 'resource generator'. The resource generator is a questionnaire that asks about specific social resources that are accessed by the individual through their personal ties (Van Der Gaag & Snijders, 2005). The close-ended questions of the resource generator are similar to those developed by Wellman and colleagues for the Connected Lives Project (2006). This questionnaire was selected as the basis for our study due to the overall suitability of its items for different types of populations and the simplicity of its application, as it was conceived to be self-administered. To ensure that the list of situations were meaningful to the life stage and socio-cultural context of the participants, the items of the questionnaire were adjusted based on the secondary qualitative analysis of the Domeyko focus group and the preliminary analysis of the first five interviews conducted at the beginning of the fieldwork. The questionnaire sought to identify specific types of emotional and instrumental help exchanged with different

groups of people (household members, close family, other relatives, neighbours, friends, organizations, and other). The questionnaire is available in Appendix A.

Verbatim transcriptions of the interviews were analyzed with the help of the software ATLAS.ti using grounded theory principles. These principles enabled an iterative approach to data analysis to go from a general and descriptive organization of the information to an interpretative analysis aided by the creation of codes, memos and diagrams (Corbin & Strauss, 2008). In this manner, during the process of analysis, data were first segmented into codes and then integrated by establishing relationships among those codes with the aid of memos and networks view.

The maps of personal communities were classified using Spencer and Pahl's typology (2004), considering the number, type, and location of ties included on the diagram. In this research four types of communities were identified:

- 'Friend-like community': friends have a central role and outnumber family members.
- 'Friend-enveloped': family members occupy the center of the map and friends surround that centre.
- 'Family-like': family members outnumber friends.
- 'Family-dependent': family members not only outnumber friends but also provide more support.

The information provided by the personal communities method and the resource generator permitted the identification of the different types of ties that form older people's personal networks, the kind of help exchanged with those people, the quality of the

relationships, and the people identified as emotionally close. All this information was used to identify similarities and differences between older people's experiences of social integration and the definitions and actions present in the Policy.

In the sections that follow I divide the findings in two parts. In the first part, I will describe the Policy and the context in which it was developed. I shall present the findings of the policy analysis organized in the four themes that summarize the analysis conducted using the primary and secondary questions included in table 7. The first theme, 'tone' of the policy, responds to the first main question (how is demographic change and its impact addressed?) and it gives a better understanding of the content of the Policy, complementing the section that describes the institutional framework under which the Policy was developed. The other three themes respond to the second general question regarding topics tacitly expressed in the Policy regarding whether and how diversity of relationships, family solidarity, intergenerational contract, isolation, autonomy, support and care, and formal means for social integration are addressed. In the second part of the findings section, the Policy analysis is compared and contrasted with older people's definitions and experiences regarding personal relationships and social integration in late life. The gaps between older people's definitions and experiences, and the topics included in the Policy help us to give answer to the third primary question, making visible the unstated narratives of the Policy.

#### **4.4. Chilean public policies and institutional framework on aging**

Since the 1980's, aging and old age became a priority in the Chilean governmental agenda; first applying an assistance-based approach and gradually emphasizing entitlements

and autonomy of Chilean older population (Calvo, 2014; Huenchuan, 2004). During that time, as part of other structural reforms under the authoritarian regime of Augusto Pinochet (1973-1989), a pension system based on individual retirement accounts completely replaced the old public pay-as-you-go system<sup>20</sup>.

A more formal institutional framework emerged with the creation in 1995 of the National Commission for Older Adults (CNAM) (SENAMA, 2012), which became the National Service for Older People (SENAMA) in 2012. Since the creation of this organization, aging policies have broadened their areas of concern beyond economic security, to include issues of health, quality of life, and autonomy of older adults (Calvo, 2013). In view of the challenges of a rapidly aging Chilean population, in 2012 SENAMA presented a document called *Integral Policy for Positive Aging (2012-2025)*. This policy document constitutes a frame for action based on three general objectives: protect the functional health of older people, improve their integration into the different areas of society, and increase their levels of subjective well-being. These general objectives are accompanied by thirteen specific objectives, each of which responds to one or more Positive Aging Goals that serve to assess the impact of the Policy. Also, connected to the general and specific objectives more or less specific actions are proposed for the short (2012-2014), medium (2015-2019) and long term (2020-2025).

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<sup>20</sup> Chilean pension system is a mandatory individual retirement account system where workers are free to choose any Pension Fund Manager (AFP) and may change from one AFP to another at any time. Employers are not required to contribute to their employees' accounts and participation is voluntary for the self-employed (Kritzer, 2008). The system is comprised of three pillars (tiers): solidarity, mandatory individual capitalization contributory and contributory voluntary (also individual). The solidarity pillar finances the poorest 60% of the population that have not contributed to the mandatory pillar and complements the pensions of those who have sporadic participation in the formal labor market and/or had relatively low wages (Bernstein, 2010).

According to the document, the Policy is *integral* “as it considers the contributions that different ministries and public services in collaboration with other social actors can make” (SENAMA, 2012, p. 43). In that sense, the integral quality of the Policy points more to the coordination between actors through the policy guidelines than the consideration of actions directed to an array of issues related to population aging and heterogeneous experiences of growing old in the Chilean context. The document also indicates that it is an *aging* policy as “it answers to the dynamic processes that occur along the course of life and history, and not only to the static condition of being an older person” (SENAMA, 2012, p. 43). Therefore, at least in its foundation, the policy assumes aging as a process rather than a specific stage of life as its focus for action.

The idea of *positive aging* is part of the foundational principles of the Policy as it does not limit itself to solving problems, “but to search for a desirable future, where the country faces with success the challenges of the new demographic structure, and where older people are healthy, integrated and able to report levels of subjective well-being as high as those of the younger people” (SENAMA, 2012, p. 43). Therefore, policy guidelines and practices attempt to go beyond reactive actions to particular situations. It aims toward a more complex and long term perspective that consider both objective and subjective indicators to assess the adequacy and impact of its actions.

The targeted population of the programs included in the Policy are generally means tested and directed to the most vulnerable people: people with very low income, without informal support networks (family), and/or, with physical or mental health issues. In most of

the cases these are the eligibility criteria to be part of a welfare program such as “Vínculos” (Links) or “Puente” (Bridge) and/or a public service (i.e. public health insurance FONASA). The targeted character of the programs and services included in the Policy responds to the action of a liberal-residual state (Olmos & Silva, 2010).

In the liberal-residual model, the state is limited to be an agent that stimulates the market to create conditions for the productive activity of the private sector, so it can be competitive nationally and internationally (Olmos & Silva, 2010). According to Esping-Andersen (2006, p. 162) “the [residual welfare] state assumes responsibility only when the family or the market fails; it seeks to limit its commitments to marginal and deserving social groups”. Examples of targeted programs are: Home Care; Protected Housing; Long Term Care Facilities; Social Tourism; Courses of Courses of Food Safe; Industrial, Sanitary and Household Cleaning; Micro Business Administration; and, Day Centres, among others. As a general requirement, the person has to be part of the income quintile I, II, or III<sup>21</sup>. This means that the monthly income must not exceed \$193,104 Chile peso (US \$280 approximately).

The different programs promoted by the Policy are of an individualistic character, as the individual represents the unit of need and service around which policy is formulated and developed (Clark, 1993, p. 27). In practice, this means that the individual bears the main responsibility for meeting his or her needs. Only when the individual fails does the

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<sup>21</sup> Chilean social policies refer to income quintiles (‘quintiles de ingreso’) to target different benefits. Income quintiles are obtained by ordering the households surveyed with the Social Protection tab (Ficha de Protección Social), from lowest to highest scores, grouped into five sections of equal size. Thus, the I quintile groups the 20% of households with the lowest score et (most vulnerable group) and the V quintile groups the 20% of households with the highest score (least vulnerable).

government steps in to guarantee a minimal level of social assistance (Clark, 1993). In the context of many of the programs contained in the Policy, this failure is determined by the income level, i.e. to have a monthly income that qualifies the person as part of the quintiles I, II or III.

The following sections present the findings of the analysis of the Chilean “Integral Policy for Positive Aging 2012-2025”. The findings are divided in two sections. The first section corresponds to the analysis of the Policy. This analysis is presented using the four themes that have been previously described. The second section of findings integrates the results of the interviews, comparing and contrasting older people’s experiences with the narratives present in the Policy document. Also, some policy implications are outlined.

#### **4.5. Findings of the policy analysis**

##### **4.5.1. ‘Tone’ of the policy: population aging as a challenge**

The more official language used to introduce the issue of population aging and the policy goals identify the former as a challenge, the challenge of transforming old age into an experience of positive aging. This contrasts with the language of the "problem" of population aging that has been used in other influential documents (e.g. "Averting the Old Age Crisis: Policies to Protect the Old and Promote Growth" from the World Bank, 1994), as well as it contrasts with the needs-based and assistance-giving<sup>22</sup> approach of previous Chilean policies

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<sup>22</sup> The concept of “asistencialismo” is usually used to describe previous policies and programs directed to older people. This concept refers to policies that conceive to be different as a defect or lack of something that needs to be supplied. These types of policies also consider older people as mere recipients of help and passive subjects who do not have the ability to control their lives (Huenchuan, 2012).

and programs directed to the elderly population. The notion of aging as a problem emphasized the social and family costs of supporting an older population. According to the current Policy, the actions developed recognize what older people have contributed to family, community and society, and seek to support and recognize older people's dignity. In the Executive Summary of the Policy we can read:

[The Policy] seeks to create a desirable future where the country successfully faces the challenges of the new demographic structure and where seniors are functionally independent and integrated into the various sectors of society, and report levels of subjective wellbeing as high as the younger population. (p. 10)

Later, the document follows:

Faced with this inexorable demographic change, SENAMA maintains that it is appropriate to anticipate the challenges that Chile will face in 2025 and turn them into opportunities. Population aging will have a strong impact on our country and the lives of the Chileans. Life experience and wisdom of the elders will certainly be a benefit. At the same time, the country will have to make additional efforts to protect the functional health of older people, to improve their levels of integration and participation in various areas of society, and to increase their subjective well-being or happiness. (p. 17)

However, underlying this positive approach there is a language of population aging as problematic. The narrative of aging as a challenge is supported by data that contrast the active older population with those who are dependent:

In fact, by 2025 it is estimated that older people over 60 years old will be, for the first time, more than those under 15 years old. Today only 20% of those over 60 years old remain occupationally active; and 22% are dependent, estimating that this percentage will increase to 30% within the next ten years. ("Positive Aging: the challenge of restoring prominence to older people", presentation of the Policy written by Bruno Baranda, Ministry of Social Development, p. 8)

Interestingly, in the aforementioned section the contrast between active and dependent people does not refer to occupationally active and occupationally dependent people. In that part of the document it is not completely clear but the contrast seems to be

between occupationally active people and physically dependent ones. This distinction is clear later in the Executive Summary where we can read:

The risks of inaction include prohibitive economic costs and negative social impacts associated with the increase in the proportion of older people with problems to perform everyday activities such as walking or sitting. (p.10)

Thus, the argument of the Policy Document focuses on the assessment of an increasing number of physically dependent older people in contrast to the active working older population. In making this argument, the underlying idea of aging as a problem emerges. The problem is the increasing population of dependent older people; people who do not fit with the notion of active and productive people presented in the Policy. Although the stress is on working older people, the idea of activity also includes people who, due to no or few functional limitations, are volunteering either in helping younger generations or actively engaged in interest groups that are part of active aging lifestyle.

Therefore, two motivations characterize the Chilean policy on aging. The first motivation is the one officially stated, in which late life is depicted as a time to receive back what has been given to family, community and society in general. Nonetheless, the beginning of this period of receiving back is not clear. If we consider that this idea is presented close to supporting data of older people in the labour force, retirement could be considered as the marker. The second motivation is more subtle, as it does not respond to a formally presented objective of the Policy. It represents the concern for an increasing proportion of dependent older people. Here, late life is represented as a time of physical and economic dependency. Thus, two contrasting narrative strands coexist in the Policy, one in line with the successful-

models of aging, including the active aging perspective, and another informed by the disengagement theory, strongly influenced by a biomedical discourse.

In this manner, although avoiding the language of population aging as a problem or a crisis, the duality between dependent (infirm, not working and/or actively engaged in groups of interest) and independent people is supported by data and topics of interest. When we examine the programs and services proposed in the Policy, we notice that two types of beneficiaries are distinguished. A proportion of these programs and services are directed to dependent, frail, and/or abused (or at risk of being abused) people and, on the other hand, to their opposite: older people who are vigorous, independent, and participating at different levels of society. Another subtle representation of late life that could reinforce the notion of aging as a problem depicts this life stage as a period of crisis and risk:

At this stage of life in which changes of identity occur, a crisis exists, there is a risk of loneliness. Social connections, participation are necessary because health is physical, psychological and social, three components intertwined. Participation allows developing an active, productive, socially protagonist old age. (p.56)

The individual experience of aging is characterized as a period of risk and crisis due to changes in identity and connectedness. Whereas the previous notion of old age represented a social problem due to the social and family costs, the problem here occurs at a more individual level. It is the individual who is at risk of isolation and it is the individual who can prevent and counteract the negative changes by participating in society. However, the causes of these changes are not mentioned nor the specific changes that occur in older people's identity. Therefore, questions arise regarding who or what determines those changes, and when and at what level the transformations occur. For instance, do these changes depend on

biology, individual attitude, and/or age stratification? Depending on the answer the issue goes beyond individual action and intersects with the structures of society that facilitate or prevent older people's social integration and participation.

The ideas that support Chilean policy on aging are based on 'keeping active' theories that, according to Marshall & Bengtson (2011), are based on values of autonomy and individualism . This policy approach confers upon the individual the responsibility for addressing the consequences of the demographic shift. According to Grenier (2012), success-based models of aging focus on preventive efforts that seek to change individuals' behaviors rather than social conditions or structured disadvantages that shape their experiences of aging. For instance, in the Chilean Policy actions directed to social integration through work, most of the initiatives give the responsibility to find or create a job position to older individuals.

Most of the programs (e.g. Job Training Program for Older Women; Courses of Food Safe, Industrial, Sanitary and Household Cleaning; and Micro Business Administration) foster entrepreneurship and participation in different types of trades that involve self-employment or informal jobs. Thus, core problems such as age discrimination and lack of infrastructure for people with mobility issues are not addressed or are expected to be solved by older people's own means. To be fair, the Job Creation Program tries to encourage potential employers to hire people from specific groups, among them unemployed women between 25 and 60 years old and unemployed men between 50 and 65 years old. However, incentives to employers

are only applicable to very specific groups, which additionally have to be classified as vulnerable people (quintiles I, II and III) who, among other conditions, have never worked.

The distinctive narratives of healthy and successful aging on one hand, and aging as a problem distinguished in this study are in line with the findings of Grenier's (2012) analysis of Canadian and English policy on aging. These competing narratives target two different groups: younger, healthy and active older people; and those who are affected by illness. These groups are further polarized by the instances of social integration fostered by Chilean policy actions (e.g. programs and services). The next section elaborates on this issue, identifying the differences between the programs targeted to dependent and independent older people.

#### **4.5.2. Different instances of integration for dependent and independent older people**

Integrating older people in society is part of the objectives of the Chilean Integral Policy for Positive Aging. Different areas are mentioned as related to social integration: prevention of abuse against older people, improvement in education and training, use of internet, participation in the labour force, housing, urban infrastructure and transportation, and cultural integration. The latter includes promoting a positive image of elderly people (e.g. in school textbooks) and opening opportunities for recreation and socialization. All these areas correspond to formal ways of social integration.

The distinction between dependent and independent people is central for the actions directed to promote social integration. Different programs and areas of integration are

implemented depending on whether the beneficiaries are physically and/or economically dependent people or are recognized as active.

[...] the promotion of the rights of the elderly has been approached from different fronts. One front has focused on participation, aimed at semi-able and able people, through the National Fund for Older Adults [...] created to finance projects designed, developed and implemented by organizations of older persons through competitions. The second component of the program, the Competitive Fund for initiatives developed by intermediate implementing partners that work with seniors [*has as its beneficiaries*] dependent older people. [...] SENAMA, is responsible also for the technical operation of the Links Program, in alliance with MIDEPLAN [*Ministry of Development and Planning*], currently the Ministry of Social Development, in which psychosocial interventions are developed for poor and vulnerable older adults, providing subsidies and social benefits integrated to the community network of social protection, strengthening or developing skills through community monitors. (p. 37)

From this description, integration through participation in a broad spectrum of social activities is only possible for relatively independent people who are already participating in a group. Eligible projects include: volunteering, productive activities, infrastructure, self-care, training, and recreation<sup>23</sup>.

On the other hand, dependent older people have a more restricted area of participation, as recipients of care through specific activities and in defined places. For instance, the Long Term Care facilities (ELEAMs for their name in Spanish) indicate as part of their objectives "to promote social integration of residents, promoting their participation and involvement with the community in which the center is inserted" (p. 50). However, specific forms in which such participation is achieved are not elaborated. Another example is the Home Care Program, which seeks to maintain people living in their homes as much as possible, as part of their community and exercising their social and family roles. In practice, the possibility of being part of the community depends on the infrastructure and the

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<sup>23</sup> <http://www.senama.cl/FondoNacional.html>

instances for social interaction created by the older person and/or the primary caregivers. As the background information included in the Policy shows, this infrastructure is insufficient. Thus, the realm for participation is mainly older people's home and their private social world (i.e. close family members).

An area where the Policy programs target social integration is that associated with participation in the workforce. As previously stated, these programs are mainly directed to healthy older people, who are expected to be not only physically independent, but also economically independent:

[...] currently, there are five economically active people for every elderly person, but in 2025 will have only three. Older people not only will have fewer people who can support them financially, but also will have to finance longer periods of retirement, due to the increase in life expectancy. ("Positive Aging: the challenge of restoring prominence to older people", presentation of the policy written by Bruno Baranda, Ministry of Social Development, p. 7)

The motivation to encourage participation through work is mainly economic, as the increased longevity may economically affect not only the individual, but also the state expenditure. The focus on healthy older people is not stated in the Policy documents. However this focus is given by the absence of recognition of the challenges faced by dependent older people to be integrated in the labour force such as: offices' built environment, adequate transportation, and remote connection with internet use.

The specific programs that promote integration of older people in the labor force offer training to increase their possibilities to find a job or become entrepreneurs. The different programs are under the objective of *productive aging* and seek to "improve the educational level and the job training of older people" (p. 43). By not recognizing the

difficulties faced by dependent older people and by not offering options, the Policy document is unintentionally neglecting their participation as productive members of society, reinforcing an image of problem and burden.

#### **4.5.3. Autonomy and Self-Management in the Policy analysis**

A second relevant theme identified in the policy analysis is the centrality of the concepts of self-management and autonomy in the definitions of the Policy as well as in the programs outlined. In the Policy, self-management is promoted through prevention and health actions as it influences personal autonomy which in turn allows to be socially integrated:

Hospitalizations in long-term care facilities as well as hospitalization can have very high costs for the country. In addition, functional health is a fundamental pillar of the quality of life and subjective well-being among older people. For both reasons, it is of vital importance to promote self-management and prevent dependency, with the aim of preserving autonomy of older people for as long as possible, contributing to a satisfactory and socially integrating aging. (p.25)

Here, autonomy is defined as the opposite of physical dependency and thus it is related to preventing health conditions that can increase this dependency. There is an implicit two sided distinction between autonomous/integrated and dependent/un-integrated people. Except for the "Protected Housing" program (Viviendas Tuteladas), it appears as if the responsibility to stay in the "positive" side of the distinction is at the individual level, by being able to exercise self-management. People who fail to stay healthy and autonomous have no other choice but to be classified as dependent. When the expectations of active aging are not met, the individual enters into the biomedical realm where issues of treatment

and acute care are the main concerns. In this sense, the definitions of the Policy, as well as the actions fostered by it, give no place to 'grey areas'.

This binary distinction also influences the rationale for allocating state resources. Active aging, then, is a cost effective idea that fosters prevention. In the actions of the Chilean Policy, the state develops instances that facilitate social participation and healthy habits of independent older people. On the other hand, dependent people need acute care, which requires greater public expenditure. The latter is in line with Grenier's (2012) findings as she states that "success-based models of aging are used to justify funneling resources into earlier periods of the life course in the name of prevention".

In the Policy document, autonomy is also defined as the "ability to make decisions, managing one's life, exercising an active and fulfilling aging" (p. 28). Although the notion of autonomy presented in the Policy involves much more than lack of physical dependence, it presupposed a favorable health condition. We can see this in the way autonomy is connected to the notion of "good aging":

Good aging is directly related to autonomy, the ability of the elderly person to extend, optimize and use the favorable health conditions to communicate his/her history, demonstrate his/her expertise, participate, have quality of life and maintain well-being in old age. (p. 15)

Together, the ideas of self-management and autonomy point to an individual who is able to prevent and avoid the negative effects of growing old and, in doing so, multiple instances for social participation and integration that influence the construction of identity are opened. Most of the programs directed to autonomous active people address different areas of life. On the other hand, people who are unable to fit in that model have more

limited choices, as most of the programs are health related, promoting rehabilitation or providing acute care.

An example of programs that are informed by the idea of self-management and self-care is the program "Choose a healthy life". In the Policy document, the accent is on the individual element of choice and the state's role as a facilitator to motivate individuals to make informed smart choices regarding eating and exercising. The program assumes a level of activity and mobility on the part of the older person. In that sense, it is directed to already active and mostly independent older people who can access the activities that are being carried out. Members of the older person's support network are not considered as a mean for the older person to get information or to reach the place where the activities are carried out.

Regarding the idea of choice, but applied to older people's care and support, the Policy does not elaborate on the different ties that could provide them. Nor does the Policy foster actions or provide services to promote older people's choice in cases where care is needed (e.g. having the option of using public services, or accessing to community care, instead of resorting to family care). In that sense, the available options are older people's personal resources –including their family ties– and then, if family fails or needs support, the state provides options to specific eligible people through institutionalization (ELEAMs) and the Home Care Program. This represents a residual approach of state's intervention, as public services are considered as a last resource, only to be used once families are overwhelmed after having used up their own resources (Marshall & Clarke, 2010, p. 27).

#### **4.5.4. Policy's assumptions of family responsibilities and involvement in older people's support**

A third theme identified in the policy analysis was whether family members – particularly children– bear responsibility on older people's support and care. In other words, the issue here is how the notion of intergenerational contract is expressed in the Policy, and how the Policy document includes this notion in its definitions and reinforces family solidarity. By using the language of duty toward older people, family obligation is not clearly stated in the Policy, but it is part of its assumptions. The penalization of family members for abandonment is one instance where the obligation is assumed.

At the macro level there is the notion of rightful return to older people of what they contributed early in their lives (e.g. love, affection, caring, spending quality time as a family together). Based on this, the state takes responsibility to ensure the safety and care of older people who are in vulnerable situations due to physical and economic dependency. This vulnerability is connected to a complete or partial breach of the intergenerational contract at the family level, due to family inability or unwillingness to care for its older members. Programs such as day centres, home care delivered by women and long term care centres (ELEAMs) seek to supplement or partially replace the availability of care from family members.

Reichert and Phillips (2009) indicate that the agreement of mutual aid between different generations (i.e. intergenerational contract) can be based on social values and norms or determined by law. In Chilean Policy on Aging, at the level of family, the

intergenerational contract is expressed in the Policy as a failure of family solidarity, in the form of family members neglecting older people's care. Here, we find language of abuse and abandonment of older family members. The role of the state is to ensure, through law enforcement, the rights of older people to receive family care. This stance toward family obligation is defined by Reicherd and Phillips (2009) as a traditional view of the intergenerational contract, similar to what they found in Germany policy.

An example of this in Chilean policy is the modification to the "Law of Intra-family Abuse" (Article 5 Paragraph 1 of Law No. 20,066) to include as instances of family abuse not only specific actions of violence, but also cases in which care has been neglected for omission or abandonment. Although the boundaries of what is considered family are implied in the law –recognizing nuclear and extended family members, as well as in-laws–, it does not consider other emergent type of ties involved in caregiving activities. For instance, it does not mention fictive kin and friends. This is reinforced on the background given to support the change in the law:

Omissions should be considered as constituting family violence, since older people, especially those with advanced dependency, require care that can only be provided by one or more persons (caregiver) and if it fails to perform (giving medications, changing diapers and/ or positions in case of those bedridden) will generate damage to the dependent person, establishing domestic violence if the care is provided by the family. (p.69)

However, other programs indicate friends and neighbours as primary caregivers. For instance, having a primary caregiver, defined as "a relative, friend, or neighbour who provides care in a regular and permanent basis"<sup>24</sup>, is among the requirement to apply to the

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<sup>24</sup> <http://www.senama.cl/CuidadosDomiciliarios.html>

Home Care Program. Therefore, there is a possibility of abuse and neglect from other type of ties not included in the law.

Beside the concern for older people's wellbeing and rights, there is a central issue influencing the importance of family solidarity in the form of care. From the state's perspective one major concern regarding older people's care is how to protect their functional health while also avoiding increasing public expenditure. Hospitalizations and ELEAMs are too costly so a tiered model of care is proposed:

The care service must take a form of pyramid-based home. Functionally independent older people can live independently in their own home or in their family home, but as the level of functional dependence increases it is necessary to go up steps and incorporate a more active role of the family, tele-care mechanisms, assistance, and home care (ranging from simple assistance and delivery of prepared food or help to clean and tidy up, to more complex care such as assistance with activities, rehabilitation exercises, and taking medicine), rehabilitation in day centers, and finally, institutionalization in long-term care facilities. (p.26)

In this model, the role of the family is central. In relationship to care, Sheets, Bradley, and Hendricks (2005) indicate that the 'family first' model proposed by Shanas (1979b) has become embedded –and we can add reinterpreted and naturalized– within neoliberal social policies, so that family support is assumed as the first line of defense in the provision of care for older people.

This notion can be found in the background for the construction of Long-Term Care Facilities:

This measure [the construction of Long-Term Care Facilities] responds to the high demand for ELEAM, which cannot be met completely either by private organizations or by non-for-profit foundations. Ideally, the "potential" beneficiaries of an ELAM are cared for at home, but in extreme cases, given the above requirements [people older than 60 years; have a Social Protection file; belong to quintile I, II or III, according to the Housing Lack Score; have housing and/or support and care needs, accredited by a Social Report; have no physical or mental illness that requires acute care in a hospital

setting, as demonstrated by a medical certificate; have some degree of dependence, according to the functional assessment performed by SENAMA; have a representative and informed consent their admission, the State shall provide them with these care facilities. (p. 50)

Despite the taken for granted role of family, Chilean social policy reflects what Reichert and Phillips (2009) have called an 'individualistic approach'. As a result, at the implementation level, family role is excluded from explicit discussions. Nonetheless, the central role of family is largely assumed and the targeted character of state's services makes family more necessary. In that sense, the individualistic approach of policy intersects with the state's expectation of a 'collectivist' pattern of caregiving. According to Biggs (2005), 'collectivist' families offer greater instrumental support than 'individualistic' families, in that they mix instrumental family support with use of welfare services. Thus, the state's practices –allocation of resources in the form of subsidies and programs- is contradictory with its own expectation.

The main indicator of the assumption of family obligation to support its elderly members is that in many programs the lack of family support is part of the criteria to apply for a service. In that sense, informal networks are assumed as part of the resources that older people have at hand. Thus, Chilean policy on aging not only takes an individualistic approach, but also takes what Clark (1993, p. 27) calls a residual approach to familism. According to this approach, public services are only justified when families have failed to meet members' needs with its (the family's) own resources. Thus, state's support is only applicable once individuals have used up all their resources at hand, being these material or social resources.

Assumptions of family responsibility toward older members are at the basis of targeted programs. Family as a “reserve of support” (Kemp & Denton, 2003, p. 756) that makes up for the services and protections not provided by the state is taken for granted. Included in this view is the assumption that in the absence of economic resources on the part of the older person, the family would have the ability and willingness to provide care.

#### **4.6. Comparing and contrasting older people’s experiences with policy narratives**

In this part of the findings section the experiences and definitions of the study participants are compared and contrasted with the four themes outlined in the policy analysis. We have to keep in mind that the study participants were healthy people who did not need special physical care, and thus this section represents their particular experiences and definitions of social integration through informal ties, family solidarity, and notions of autonomy.

This second part of the findings sections is directly connected with three of the themes addressed in the previous sections (i.e. different instances of social integration, autonomy and self-management, and assumptions of family responsibilities and involvement in older people’s support). Also, the experiences of the study participants presented here allow identifying different issues that remain unexpressed (third primary question), offering insights on the tensions between the actual experiences and expectation of older people and the old age that is assumed in and constructed by the Policy.

#### **4.6.1. Different instances of social integration through (in)formal relationships**

The different dimensions for social integration described in the Policy correspond to formal means of integration. Informal forms of social integration, i.e. family and non-kin networks, are not explicitly recognized, despite their centrality in older people's experiences. According to Scharf (1998), integration through informal relationships includes considering the nature and quality of contacts with family, friends, and neighbours. The centrality of informal relationships has been highlighted by different scholars that have noticed their importance for help exchange, engagement with new life styles, and identity construction (Pahl & Spencer, 2004; Phillipson, 2013).

Study participants' experiences indicate that exchanges of emotional and practical support occur between them and their circle of relationships in different situations: lend and borrow money, in case of an emergency, transportation, daily conversation, recreation, for legal paperwork, and access to information. Family and friends, because of their professional skills and knowledge or acting as a bridge, are particularly important when legal procedures and prompt access to health services are required. The importance of informal relationships in late life are better elaborated in chapter 2 and 3, which show the role of friends and family members in older people's social networks and personal communities.

A point where the Policy and the experiences of the study participants present clear gaps is in the notion of community involvement. For instance, the Policy mentions that older people experiencing dependency should maintain their involvement with the community. If community is understood as a geographical place such the neighbourhood, this integration

could have little meaning for the person. According to study participants' experiences, they have little or no relationships with their neighbours. The exchange of help with neighbours is very limited and only 4 participants included neighbours as part of their emotionally close network of relationships. The discrete role played by neighbours in older people social integration is in line with Scharf's (1998, p. 159) findings for the German context, who noticed that the frequency of visit by and to neighbors were low among older people, and the interactions were generally to exchange pleasantries.

Social integration through informal relationships is different for older men and women, an issue not particularly recognized in the Policy. For instance, the size and variety of the ties that form the circle of emotionally close people present gender differences. Men's network of emotionally close people had an average of ten people, whereas women's had seventeen. While 77% of men had networks of ten or less members, 71% of women had networks of more than ten members. Also, gender interacts with cohort as male participants between 67 and 74 years old have more family-based networks of emotionally close relationships. Whether these differences are due to lack of opportunities to connect with people outside the family circle after retirement and/or to men's individual abilities to develop new emotionally close ties requires further analysis. These gender and cohort differences relative to social integration at the level of community and friendships ties represents clear examples of heterogeneous experiences of late life.

Phillipson (2013, p. 124) notes that inclusive ties, as the ones found among family members, fit well with institutions such as the welfare state and stable intergenerational

contract. However, the current social context is characterized by fragmented and personalized pathways, where public provision of help has shifted to more flexible arrangements. According to Phillipson (2013), in such a context non-blood and multigenerational relationships would be better suited to deal with the different risks faced in late life. The gender differences in Chilean interviewees show that men's networks of emotionally close people, as well as their main sources of practical and emotional help, are better suited for a more traditional type of society (as previously described by Phillipson). Women, on the other hand, have a more varied spread of ties, which would give them an advantage at least at the level of informal forms of social inclusion. However, these gender differences and the challenges they represent to promote social inclusion and prevent social isolation in late life are not acknowledged in the Policy, where programs directed to older people assume old age as a more or less heterogeneous experience. A good example of this assumption is the important role given in the Policy to involvement in association and clubs as means for social integration. However, male study participants have less involvement than women do, with 50% of men and 81% of women participating in organized activities. Thus, these types of programs would be more beneficial for women than men unless they are specifically developed to increase the involvement of male participants, attending to their particular needs.

Informal relationships also play a role in what seems as a formal means of social integration. That is the case of social integration through work. Participation in society through work is defined in the Policy as a means for economic security. However, from the

experiences of the interviewees, the workplace also represents the context where they can be socially integrated through the relationships that are created.

Particularly for men, work is an instance not only to earn money, but also constitutes a way for self-fulfillment through exchange of professional experience and knowledge. In the experiences of male interviewees, the workplace appears as one of the main instances to develop relationships with people outside their nuclear family:

They are friends that I've had let's say, through work, for a working relationship first and closeness of thought, or situations we have lived [...] Claudio has around 66 years old... and this one lives in Providencia ... and he is at the same level as friend, uh, and in fact it's also a labor relationship as we are planning to do things, etc. (Fernando, 66 years old)

We work a lot together [*with his friend Enrique*], so the bond was strengthened... we have worked together for 15 years, done seminars together, so we know what we do". (Matias, 60 years old)

Predominantly for men, the workplace is a central instance of social integration through friendship and professional ties based on personal interest. The workplace also provides a context where different social identities are at play<sup>25</sup>. Therefore, the idea of work as an income source to be or to remain economically independent is a narrow approach to the meaning and experience of work. This leaves aside opportunities to develop strategies to increase the social connectedness of men through groups and clubs that serve as instances to discuss professional interests.

#### **4.6.2. Older people's experiences and expectations of family solidarity**

The notion of family solidarity is tightly connected to the previous section. Although not explicitly stated, the Policy assumes the central role of the family to facilitate social

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<sup>25</sup> This topic is better developed in the papers on social capital and personal communities.

integration. However, the lack of analysis of informal networks of older people's in the Policy background hides the complex role of these networks and the amount of support exchanged from the older person to other family member. The experiences of the participants show the central role of older people as providers of help to children and grandchildren. As a reference, from the total of 26 women and 14 men interviewed, 13 for each group define themselves as head of the household (main breadwinners). From those, 8 women and 7 men have children living with them, meaning that the children depended on the material support of their parents.

Another assumption in the Policy document is that the older person would be willing to receive support and care. The experiences of the study participants question this assumption. In fact, retaining or maintaining independence and being able to solve the challenges of growing old by themselves is essential for them. Few participants gave the argument that children must help their parents because they are family. The majority stressed that help should not respond to obligation or duty, but to a decision made by the children based on the quality of the relationship and the example given by the parents:

I think that the child's duty is to dedicate himself to his children, and to his family, that's how I deeply feel it [...] but in turn I feel that the children have a special attachment to their parents, and they show their concern toward the weakness of the father or mother. I realize that for the phone calls, when one is in bad health, for that concern of "take care", when we are going to go out, no? But there is no duty; there is no obligation from the children to his father [...]. (Rodrigo, 67 years old)

[...] duty as such does not exist. Because unfortunately, when I have a child the decision is mine, it's not of my child. Therefore my duties are to guide my children to have a good life. Now, if they by... by their own willingness, stuff like that, consider that I did a good job, they are going to help me. (Julia, 60 years old)

Similar to Kemp and Denton's (2003) findings relative to the allocation of responsibility for later life, there is a strong mismatch between the Policy assumption of family as a "proper" reserve of support and people's expectations toward their families. Most specifically, the experiences and expectations of the interviewees are in line with the idea of "intimacy at a distance" (Rosenmayr & Köckeis, 1963). Reichert and Phillips (2009) cite this concept to discuss the assumption in public policies of intergenerational co-residence as a sign of emotional closeness between generations. According to these authors, co-residence reflected more economic and occupational needs than emotional closeness. Reichert and Phillips add that co-residence may, in fact, prompt tensions among family members. The case of Raul (67 years old), who has a very complex relationship with his wife and son, is an example of the latter. This quote stresses how Raul's son privileges giving economic support to her mother:

Do you want me to tell you the truth? I practically live, we live with my wife at expenses of my son [...] he is not despicable, but not that good also... he sustains us, let's say, the house. He has a credit card for my wife and she goes to the supermarket, pays the electricity and the water, [he] pays everything. So the only thing I have is to go buy the bread, the veggies some times, and nothing else. If my son were to die, we would go down to the floor I think [...] he is a good son overall. [...] to the mom, he helps her more than to me, because I go, for instance, to the public clinic, plain and simple; the mom nope. The mom goes to the private clinic.

In the same way, Biggs and Powell (2003) commented on the mythical status of the happy family, as reflected in England's policy on aging. According to Biggs and Powell, data showed that good relationships among family members were based on relatively loose and undemanding exchange between generations. Similarly to Reichert and Phillips (2009), Biggs and Powell note that deep commitment was in fact typically the result of extreme situations. We can observe something similar in the case of the study participants. The high value given

to be independent is accompanied by a strong sense of boundaries between their own lives and their children's lives:

We share when we sat down to lunch. But I do not intervene in the lives of my children, or anybody's life, unless they ask for advice. But in turn, when they "mom, do not do this", "do not do that", I say well if I do not mess with you, you do not mess with me, there I mark the limit. (Julia, 60 years old)

My children are all very independent. Let's say that I was also super independent, and I raised them and taught them to be independent [...] because she [daughter] is professional, has three children, is separated, then I do not get involved in her life and she does not get involved into mine. Because I cannot get into her life about how to raise their children, because all I say, once they grow up I'll be under a grave. [...] I help her as I can, especially if she asks me for something, obviously, but I will not invade her privacy and she will not invade my privacy in my department. (Marisol, 73 years old)

Thus, at the level of current expectations and practices, older people are also inclined toward a model of individualistic family care, though the role of subsidies and welfare programs are unclear as many of the study participants are not eligible for them. However, the notion of additional support is present, and such support seems to be, more by need than by choice, the family:

I believe that here, in this country, we unfortunately have to rely on it [the family], we don't have the conditions, because I believe that we can count with the fingers the people who can be totally self-sufficient, because they have economic resources that allow them having someone to assist them, all the time. But in reality I believe that one needs to resort to the closer family... I believe so. I mean, I believe that tomorrow I would have to rely on my children to say "hey, could you take me to the doctor?". (Alma, 60 years old)

I believe that the older people are not the older people from the Family Allowance Compensation Funds [*Cajas*], the one that is travelling, the one they show you, I believe so. I go a little further, because I believe that many adults are abandoned, I mean, it bothers me deeply that deception of the protected elderly. (Patricio, 60 years old).

What is particularly interesting about Patricio and Alma's quotes is how they challenge the ideal of autonomy, self-management and individual responsibility presented not only in the policy, but also in the institutional discourse, as exemplified in the opening quote of SENAMA's former director.

#### **4.6.3. The importance of autonomy and self-management in older people's experiences**

The strong emphasis on autonomy and individual responsibility present in the Policy is in line with study participants' experiences and expectations. In the language of participants, the ideas of autonomy and self-management are contained in their descriptions of being independent. Julia (60 years old) talks about late life as a stage of independence and freedom:

For me, independence is being able to rely on things you do economically by yourself, isn't it? To move, to do your own things, to be able to produce your own income. And when you reach a certain age you are more independent ... You don't worry about ....., One worry about the children in a way ... You don't need to worry about teaching... if they have bad habits you cannot remove them. I mean, the freedom, that of feeling a little free from responsibilities. (Julia, 60)

Similarly, Catalina (68 years old) highlights the importance of independence, but with attention to its role during the life course. In that sense, she reflects on the value of independence for particular groups and cohorts:

[...] women of my generation were educated, formed and guided to be dependent on others, on a patron, a husband. If you got out of the home was to get married. Then all these women rarely were independent. You could not think of having, at that time, a child being single, neither you thought about to be divorced, the faith, the sin, and the shame of the family. Then the independence to think and act is super important for both the man and the woman. It is a concept of life; independence has to do with the freedom to choose, to choose certain situations, to say 'no' in some circumstances, for me that is independence, freedom.

The shared emphasis on autonomy can have positive effects, as they help to empower older people. However, in both the Policy and the study participant's expectations, the transition from life styles of the third age to those of the fourth age is blurry. More so if we consider that state's initiatives directed to dependent older people are carried out in very specific and separated spaces. In this context, older people may fail to envision and plan for a future that cannot completely meet the expectations of preventing disease, keeping active, and being independent. Matias is currently working and active. His current life style and future expectations match those promoted by the successful-model of aging present in the Policy:

[...] I mean I do not see that the picture can change much, uh, in fact I never considered to be dependent, especially now, because the age will not allow me, but... We will continue working and doing the same things we did before... I'm talking about working less, to earn more and enjoy the time, which you see that it becomes very difficult, a bit utopian. (Matias 60).

Although Matias tries to articulate the idea of how his always independent personality and life style will influence his future, he can only visualize the lifestyle that is promoted for the third age. In other words, he is acknowledging the utopian character of keeping such lifestyle, but without proposing an alternative plan in case he cannot achieve that desired healthy, independent, and active older age.

The perspective of the participants matches with the models of successful aging presented in the Policy. The ideas of keeping active, productive and healthy are considered in the Policy and in the study participants' narratives as notions of personal success and failure. However, for the study participants, to be independent is signified as being independent from their children. In that sense, participants' expectations rest almost exclusively on their

own resources and on the help and care they can exchange with their spouses or partners. This represents an important gap within the assumption in the Policy document about family responsibility toward older members that is based on a normative notion of the intergenerational contract.

#### **4.7. Conclusion Chapter 4**

This chapter sought to compare and contrast the ideas and practices relative to personal relationships and social integration of older Chilean people with the definitions and forms of social integration supported by Chilean policy on aging. Particular attention was paid to identify whether and how the formal and informal ways of social integration relevant in older people's experiences were included and supported by the Policy definitions and programs.

The quote at the beginning of this chapter anticipated some of the main findings of the social policy analysis. One of the main characteristics of Chilean policy on aging is its alignment with successful models of aging while locating the older person at the centre in both the policy narrative and actions. Although this should not be necessarily negative, it has resulted in an invisibility of experiences and conditions of interdependence, such as the complex relationships with family members and friends, as well as the diverse motivations that underlie different forms of participation in society. The distinction between dependent and independent people gains salience in the Policy narrative when interdependence is neglected.

In this manner, the findings indicate that two narratives coexist in the Chilean Policy on Aging. On the one hand, the document constructs aging as a challenge that needs to be tackled by society as a whole. A big part of the responsibility is assigned to the older person. This is done at the narrative level with the notion of active, productive and healthy aging. From this perspective, aging is seen as an issue of lifestyles (Biggs & Powell, 2003), as an outcomes of choices taken at the individual level that should result in a good aging process and therefore in a good old age. In that sense, the failure or success in achieving the idealized version of the third age is, as noticed by Grenier (2012), a matter of individual responsibility and choice. At the level of state's programs, the targeted character of the services indicated in the Policy also points to individuals' own resources.

On the other hand, the Policy constructs old age as a problem. The 'problem' is constituted by people who do not meet the terms of a healthy, active, independent and productive aging. Therefore, the main characters in this second narrative strand are 'dependent' older people, who are referred using a language of vulnerability. What are the consequences then of these coexistent narratives for older people's instances of formal and informal social integration?

By analyzing the Policy programs we see that very different physical and social spaces are given to people who fulfil the script of successful-models of aging and those who do not. Independent, active, healthy and productive older people are expected and encouraged to participate in different spheres of society, as workers, volunteers, consumers, and members of community groups. On the other hand, people who fit in the model of vulnerable and dependent aging are integrated by the rhetoric and means of the biomedical realm. People

from this group are not constructed as active citizens and 'subjects' in charge of their aging process, but as 'objects' of care, to rephrase Huenchuan's (2009) distinction between older people as subjects or objects of rights. Interestingly, despite that interdependence has not been central in the Policy narrative, here the responsibility for elderly people's care is transferred to families, and if the family fails, to the state. The latter, nonetheless, would be true only for those who are eligible. In that sense, a central underlying assumption in the Policy is the availability of a safety net given by the family material and human resources that would support older people once their own personal resources to maintain an independent living fail.

The latter results are in line with Phillipson (2015) and Settersten and Trauten's (2009) argument of later life as being reconstructed in late modernity as a period of potential choice and risk. In the context of a post-traditional social order, pensions, employment, retirement and intergenerational relations have experienced changes (Phillipson, 2013). Older people would have more choices to live their life more flexibly in ways that are congruent with their personal interests and preferred life styles (Settersten & Trauten, 2009, p. 457). However, at the same time, people assume these choices with unknown consequences. Any outcomes, including the negatives ones, have to be negotiated by the older person and his or her family in a context of weakening institutional support from the state:

Old people are largely on their own with only the safety nets they can create with the resources they have, whether through personal and family resources or through social skills and psychological capacities [...]. (Settersten & Trauten, 2009, p. 458)

The focus of the Policy on individuals' responsibility to assume the opportunities as well as the difficulties of old age is an example of how the risks once carried by social

institutions have been placed upon the individual. The creation of contribution pension schemes (as the one used in Chile), unequal access to secure employment, and stagnation in wages and salary create different forms of inequality in late life, which have to be shouldered by the older person and his/ her family.

From the standpoint of the Policy on aging, the safety net is mainly formed by family members. This is clear when analysing the narratives surrounding family responsibility, where two coexistent narratives can be found. For active and independent older people, not only family, but close and thick relationships in general are at the periphery. In fact, the lack of analysis of changes in living arrangements, family composition, family life and social world of older people in general, is a clear indicator of how the older individual itself is located at the centre as an active citizen. He or she can and should contribute to society, and more specifically to the economy, so that fewer demands on pensions and support are made. In contrast, for 'dependent' older people family is at the centre. Family members have the legal obligation to care for their old members. In that sense, a notion of family solidarity supported by a traditional form of the intergenerational contract exists. Caring obligations are enforced by the state based on a traditional normative notion of family solidarity, which in turn aligns with the state's aim of reducing social expenditure.

According to Biggs and Powell (2003, p. 104) "the success of a family policy can be judge from the degree to which people live within the stories or narratives of families created by it". When observing the experiences of the study participants, we can see some matches and gaps with the definitions and practices of the Chilean Policy on aging. Older people's experiences match with the expectation of autonomy and independence stated in

the Policy, and they visualize themselves living old age under the ideal of a healthy third age of activity and productivity. However, the interviewees do not place family at the frontline in case of need and care. They do not expect, nor do they want, that family ought to take care of them in the future. The latter, nonetheless, does not mean that family solidarity and willingness to care has weakened or is disregarded. Instead, as noticed in other studies (Biggs, 2005), familial support and care have moved away from relationships based on normative obligation toward mutual negotiation.

A limitation of this study is the specific cohort of its participants. However, despite them being part of a young cohort, the study participants' experiences with family members, friends, and organizations can give some ideas about their personal network and the social capital embedded within these networks. Understanding the variety and complexity of older people's relationships and forms of social integration can open new possibilities to prevent social isolation and promote different forms of social support that are valued by the older person for their emotional and practical benefits. As Grenier (2012) noted, policy interest on identity and lifestyle choices open an opportunity to recognize how older individual negotiate and shape their life course, challenging fixed approaches to late life. The experiences and expectations of the study participants provide us with some glimpses of how later stages of their life course may look like and whether the current policy actions and socio-cultural structures are fostering the type of late life they define in their narratives and expect to construct in their practices.

## 5. Conclusion

This study was designed to explore the personal relationships of older people living in the Metropolitan region of Chile. The literature and data available on this topic for this specific context are limited. Little has been studied about the important ties with which older people exchange help, and whether the types of help vary depending on the kind of tie the help is exchanged. In the same manner, although the effects of socio-cultural changes in the Chilean context have been part of academic and public discussion since the return of democracy, little attention has been given to the effect of those changes in the current generation of older people. Moreover, no previous studies have linked the rapid process of population aging, its effect on the availability and management of support networks in late life, and the socio-cultural changes experienced by the Chilean population. Recognizing the gap in knowledge, the study sought to answer the question:

- *To what extent and under which circumstances do older people exchange help and complement family resources with other types of personal ties (e.g. friend, neighbors and/or state)?*

The search for answers to this research question has focused on the composition, function and meaning of older people's personal relationships. These issues have been explored in the result chapters 2, 3 and, from different angles. Particularly, chapters 2 and 3 represent two different ways of analyzing the data to stress different aspects of personal relationships in later life. Using a personal communities approach, chapter 2 analyzed the diversity of ties that form older people's networks, with especial attention to their emotional

function and subjective meaning. The personal communities approach allowed identifying, from the participants' perspectives, the emotionally important relationships that form their network of close relationships. Chapter 3 examined older people's social capital with a focus on whether and under which circumstances family and friendship ties had bridging and bonding properties to provide older people with practical and emotional support and to connect them with different life styles. This chapter challenged views that equated bonding ties with strong ties —commonly represented by family and friends—, and bridging ties with weak ones. Finally, chapter 4 used a narrative approach applied to policy analysis to explore what forms of social integration are fostered by Chilean policy on aging to then contrast them with older people's actual experiences of social integration in later life.

The findings presented in these chapters recognize the influence of the socio-cultural context in which older people have developed their relationships. As stated by Osorio (2006), population aging in post-industrial societies, such as in Chile, is a complex phenomenon of analysis as key social transformations intersect. In this thesis, the way in which older people manage and signify the ties that form their personal networks can be understood as representing a tension between the values associated with an individualized society and the need to depend on personal ties due to neoliberal social policies and limited services directed to older people.

The current influence of socio-historical processes shaping the particular experiences of the study participants has been addressed by reviewing the literature (chapter 1) describing the structural and cultural changes experienced by Chilean society. In a more

specific manner, the current social policy on aging —the object under analysis in chapter 4— represents the social norms and values shaped by these changes.

To answer the research question, I interviewed 40 older men and women living in the city of Santiago, Chile. I also carried out an interpretive narrative analysis on the Chilean *Integral Policy for Positive Aging 2012-2025*. It is not the intention of this conclusion section to offer a summary of the findings, nor to repeat the conclusions already presented in the previous chapters. My intention in this final section is to go back to the overarching issues identified in chapter 1. Here, I focus on how the experiences of the study participants regarding their personal relationships can be framed by the particular Chilean context. I also connect the findings with the two variants of the theory of individualization (described in chapter 1) to contextualize the particular experiences of Chilean older people with global social processes of cultural change.

### **5.1. The role of the socio-cultural context in shaping the composition, meaning and function of personal networks**

The different functions of family and friendship ties are shaped by socio-historical processes and structural forces. In the Chilean context, socio-cultural changes triggered by the dictatorship period greatly and negatively impacted trust in institutions and among people. This negatively influenced how individuals think about other people and institutions, their willingness to develop new ties, as well as older people's decisions about the types of help that could be exchanged.

In addition to the latter issues, the structural changes introduced in the 1980's and continued after the return of democracy have influenced social policies, which are now characterized by services and programs targeted to the most vulnerable population. As a result, a diverse network of personal ties plays a very practical role in later life by providing functional help and specific forms of connection to services and information.

The low levels of institutional trust that characterize Chilean society are central to our findings and conclusions. It is in that context that we can better understand the double function of family and friendship ties that work as both bonding and bridging social capital. The recognition of this double function has two implications to the social capital theory. First, the findings support and at the same time expand —by paying attention to the influence of the context— what Leonard and Onyx (2003) found in their research: people are more willing to take risks to access other networks for information and resources when they used trusted intermediaries. In other words, in a context of low institutional trust, bridging social capital is not necessarily formed by weak ties of dissimilar people. In fact, these ties need to be people who are emotionally close. Interestingly, they also need to be similar and at the same time dissimilar to the older person, depending on the situation where different resources need to be mobilized.

Chapters 3 and 4 in particular shed light on the bonding and bridging properties of family members and friends, where bridging ties assist the access of older people to services, organizations, programs, and relevant information. This finding supports the critical variant of the theory of individualization for developing countries as stated by Robles (1999, 2000), showing that individuals must seek help from family, peers and other informal ties to be

included into society and thereby compensate for weak means of formal social inclusion provided by public and private institutions. Scharf (1998) distinguishes between integration through *formal* and *informal relationships*. Our study findings indicate that, in the Chilean context, social integration through informal relationships (represented by family and friendship networks) is central to both supplement formal relationships (e.g. participation in the labour market) and to connect older persons with those formal relationships.

The second implication is closely connected to the first one as it has to do with the distinction weak/strong and bonding/bridging ties. Family and friends are usually defined as strong ties in the social capital literature and tend to be presented as equivalent to bonding social capital. The findings clearly show that study participants define friends and some family ties as emotionally close relationships, which is an important aspect of strong ties. However, depending on the situation, friends and family ties act as bridging social capital. When we attend to criteria of (dis)similarity to differentiate between bonding and bridging properties of personal ties, we see for example that a child can be similar in terms of socioeconomic status, but is nonetheless from a different generation and plays roles in society different from those of his or her parents. Thus, a family member or a friend can be both similar and dissimilar in relationship to the older person depending on the context where the tie is being used. The dissimilar characteristics (e.g. age, profession, skills) can be useful to connect with resources that could not be mobilized by the older person her/himself.

The qualitative approach with focus on the meaning of personal ties used in this thesis allowed recognizing the weakness of applying binary categories to describe and

analyze older people's social capital. Specifically, the distinction between bonding and bridging ties, although useful, may hide how a tie can work as bonding or bridging depending on the situation. In addition, the definition of bridging ties is complex in the context of later life, as not all bridging ties work in the same manner. This can be linked back to the research question to better understand the circumstances under which older people complement family resources with other types of personal ties. The meaning of personal relationships in later life, and the needs and expectations of material and emotional support are shaped by cultural norms of an individualized society. These cultural norms give a positive value to being independent and self-sufficient, and support the notion that individuals should create their own modes of living (Morgan, 1996). It is in this context where the differentiated role of friends and family members described by the study participants can be better understood.

From a more practical standpoint, both family members and friends can help the older person to connect to resources that would be otherwise difficult to access. However, friends represent a particular type of bridging tie given by their similarity, in some aspects, to the older person. From the study participants' experiences, we observe that friends represent the preferred ties to exchange emotional support, as the life experiences and/or similar interests add a variety that family members do not have. At the same time, they are emotionally close yet outsiders to the family, which make them the ideal ties to ask for advice in case of family issues. De Souza Briggs (2003, p. 2) indicates that bridging ties are important to develop broader identities and communities of interest as these relationships help to bridge across roles, symbolic interests, and worldviews. We could specify the latter by saying that friends play that particular role for the study participants, as friends connect the

older person with advice, information and activities that cannot be facilitated by family members.

In addition, the role given by the study participants to friends as preferred sources of support for certain issues, can be also understood as way of being self-sufficient and keeping an independent live style for themselves and their children. In this regard, I used Boneham and Sixsmith's (2006) concept of *negotiated reciprocity* to identify the instances where the interviewees expressed difficulty in asking for or accepting support from their children. In line with the values of an individualized society, older people do not exchange help based on normative moral obligations (e.g. familism), but they actively create, negotiate and manage their personal relationships. The inclusion of a diversity of ties in their network of relationships, as indicated in chapters 2 and 3, allows older people to actively manage the resources embedded within that network. With this, older people try to avoid becoming a burden as they exchange diverse kinds of support with different types of ties.

Finally, we can connect the value given to independence and the particular meaning given to family and friends by the study participants with the low levels of social trust present in Chilean society. These low levels of social trust shape to some extent who and why older people develop certain types of relationships to exchange different kinds of support. The Human Development Report of 1998 (UNDP, 1998), cited in chapter 1, indicated that 64% of the people surveyed believed that it is difficult that others do something for other people without expecting something in return. Eighteen years later we find similar experiences among the study participants, who negatively perceive asking for favours due to the commitment this might create. I used the concept of *altruistic help* (chapter 3) to describe

situations where rules of generalized reciprocity were at play. This type of help exchange, characteristic of close ties acting as bonding social capital, seems suitable to get support without the need of asking for it and without acquiring further commitment. In a similar vein, the low levels of social trust present in Chilean society can be described as low trust in anonymous others and it is in this context that we can interpret *clustered personal communities* (chapter 2) as indicating the sharp distinction between those people who can be trusted upon and those who cannot.

## **5.2. Population aging and socio-cultural change in Chile**

As stated in the research question, this thesis connects two forms of social change: the socio-cultural changes previously described, and a rapid process of population aging. We could expect that the rapid process of population aging would seriously impact the availability of support and care in late life, as availability of family ties will decrease. However, in light of the findings, we can conclude that older people have the ability to adapt to different scenarios. Such adaptation can be seen in how they complement the different resources embedded in their networks of relationships by actively constructing and negotiating their personal ties. New sources for exchanging help are available, accompanied by more complex functions of personal relationships. Thus, the findings contribute with research based evidence to the literature suggesting that late life today is a period of choice and risk (Phillipson, 2015; Settersten & Trauten, 2009), where choice represents opportunities to develop relationships and support network that are in line with older people's actual and expected life styles.

The findings can be framed by the theory of individualization and the literature on socio-cultural change in Chile. From the theory of individualization, the question about circumstances also relates to more complex functions of personal ties in late modernity. We can see, for instance, how elements of voluntariness are present in the construction of personal networks, and how emotionally central those relationships are to give more symbolic forms of social integration. I have shown in chapters 2 and 3 that these ties play a role in older people's lives that is close to an individualized society as described for the European context by authors like Beck and Beck & Beck-Gernsheim (1995b). The findings indicate the important functions of personal ties in later life, where they provide not only practical and emotional help, but also support older people's sense of belonging and identity. In addition, older people do not exchange help based on normative moral obligations (e.g. familism), but they actively create, negotiate and manage their personal relationships.

### **5.3. Implications of the findings**

The previous section has indicated the contribution of the findings to the social capital theory, providing a clear distinction between the concepts of strong and weak ties and bonding and bridging social capital. It has also provided research based evidence to examine the applicability of the theory of individualization to the Chilean context. Overall, the findings stress the importance of considering the different forms in which older people become integrated in society and the extent to which such integration is shaped by personal as well as contextual circumstances. In this manner, the study has other conceptual as well as practical implications that can inform future studies, policy development and professionals working with older people:

- The narrative approach to analyze social policy on aging, although perfectible, is an attempt to make visible and provide a clear conceptually and empirically grounded framework to conduct a narrative analysis to social policies to recognize the normative and cultural aspects of social policies on aging.
- Studies based on a personal community approach have mainly (if not only) been conducted in the European and North American context and have not generally focused on older populations (Chua, Madej, & Wellman, 2009a; Pahl & Spencer, 2010; Phillipson, 2003; Wall & Gouveia, 2014). Thus, the research findings also contribute to the available literature on changes in family structure and meanings in the context of late modernity, adding the experiences of older people living in the global south. The findings indicate a complex context where the availability of support and care in late life depends on interrelated circumstances that include the history and quality of older people's relationships with family ties and friends, the institutional context and its changes at the level of values and structures, and the possibilities of older people to manage their networks of relationships.
- In the particular Chilean context, the research findings advance knowledge on the qualitative aspects of older people's personal relationships, the potential that their personal networks have to provide support in late life, as well as the way in which older people contribute to their close family and non-family ties. At the same time, the study provides a research based understanding of the ways that the individualization process can influence the meanings of personal relationships, a topic that has been largely discussed but rarely studied in Chile. The consideration of the particular socio-historical

processes of Chile also provides context to advance understanding on the function of personal ties in a context of low social and institutional trust.

- The recognition of different types of friendships and the gender differences in creating and maintaining these friendships during the life course is central to successfully promoting connectedness in late life. The study participants' experiences of friendship have shown that different strategies need to be used if we are to foster friendship in men and women. While the former tend to have work-bound and life-long friends, women are more inclined to develop new friendships in different contexts. Programs directed to increase social participation and connectedness in later life should recognize that these gender differences when developing, for instance, male oriented community programs that attend to their specific interests and particular experiences of aging. If we consider the importance of work and professional interests in men's identity, perhaps a good start is planning workshops that allow them to learn a new skill or practice and share an established one.
- Related to the latter, social policies can benefit from recognizing the diverse forms in which older people engage with their families and community, which goes beyond their participation in recreational activities. For instance, the consideration of the specific situations in which older men tend to interact with new people in a meaningful way is also central to helping in their preparation and adaptation to post-retirement life and prevention of their social isolation.
- The findings have shown that not all the ties included in older people's network of relationships are positive, and serious situations of dependency are strengthened due to

insufficient or inadequate support from the state or other organizations. The consideration of different situations of physical and psychological violence as well as abandonment, as stated in the Policy, is necessary but not sufficient to foster effective means of social inclusion and integration in late life. Thus, the diverse ties that could provide support to older people as well as the quality of the relationships with those ties need to be considered when assessing the support networks of older people (e.g. questionnaires used by social services to assess social support).

- Social policies designed to improve the quality of life in older people could benefit from considering the array of ties that form older people's personal networks and the different functions that those ties play beyond assumptions of the strength and usefulness of family ties. For instance, recognition of the important role played by emotionally close ties can be at the basis of programs that seek to decrease social isolation in late life. These programs could include the training in and the use of communication technologies that help to keep people connected. The current Policy on aging includes programs to train older people in the use of computers and internet through the "Biblioredes" Program. The Program is directed to the broad population and a 14% of the participants are older people. This is a good advance to facilitate the access of older people to technology. The program could be further improved if the particular needs of older people in risk of isolation are included, such as geographical closeness and accessibility of the venues and the possibility of accessing computers and other IT equipment after the course is finished. As indicated by study participants, the use of technology (e.g. email, Facebook, Skype, and others) are key to keep friends from the same cohort in touch and

re-connect with old friends. If improving connectedness in later life is included among its objectives, programs like Biblioredes could help to reduce the problems of geographical distance and/or decreasing mobility as people grow old or problems of increasing geographical mobility (immigration) of family members.

#### **5.4. Study limitations and future areas of research**

The findings and conclusions of this thesis represent only the experiences of the study participants. It is beyond the scope of this study, however, to generalize the findings –for which qualitative methodologies are not well suited. Overall my motivations to inquire on personal relationships in late life were always related to better understand how older people defined their personal ties and how that influenced how they mobilized the social capital embedded in their networks. Although small, I tried to make the sample as varied as possible to avoid only reflecting the experiences, for example, of only a young cohort of middle and upper class, educated and married older people. In this regard, I attempted to include the experiences of men and women of different ages within the selected cohort of people, different marital status, living arrangements, and diverse socio-economic status. However, we must remember that all these participants live in the Santiago Metropolitan Region and present a higher than average educational level in comparison with Chilean population aged 60 years and older. Thus the experiences of the study participants reflect those of an urban and relatively well educated population. This influences the quantity and quality of programs and services they can access as well as the specific dynamics they establish with family members, friends, and the community in general.

The use of the resource generator to capture some aspects of older people's social capital also had some limitations, as well as strengths. The original idea was to use an open ended questionnaire to explore the different types of support exchanged by older people. However, as stated on chapter 2, the complexities of talking about help resulted in a change of strategy. Thus, while in the process of doing the fieldwork, I decided to create a resource generator with closed ended questions. The strengths of this questionnaire were that it was easy to use in a short period of time; provided standard questions for all the participants, and made general analysis easier. It also made sense to the interviewees as the questions were centred on the Chilean context and contained items that could be expanded through discussion and conversation during the interviews. However, another strategy that could have been perhaps more appealing and engaging for the study participants was to make a more extensive use of the personal communities' method to produce information about the resources exchanged between the study participants and the members of their networks. However, that requires more time to conduct the interview and may have required two interview sessions. It also would have needed more time to develop an interview schedule that adapted the personal community method around questions and activities that enabled the research to 'map' the resources of each participant.

I achieved a varied sample in terms of gender, living arrangements, marital status, and socio-economic status. However an analysis of the data that takes full advantage of the different variables that this variety provide can go further than what I have accomplished in this thesis. I focused on gender differences in composition of personal communities and support networks, but more variables can be considered to better understand the underlying

mechanisms influencing those gender differences. Interestingly, the analysis of personal communities indicated that gender and cohort interact in the case of the study participants, showing that men between 67 and 74 years old are the ones who base their network on family ties. This finding might be suggesting not only that this particular cohort of men are at risk, but also that the younger cohort has adopted strategies similar to the ones used by women to develop and maintain their networks of relationships. Of course, more research needs to be done to explore this issue, where we could include other variables (e.g. socio-economic status) that might be influencing the strategies to incorporate non-kin ties in the network of support and meaningful relationships.

When planning how to conduct the study, I decided to give a broad account of Chilean older people's social capital instead of focusing on more specific groups or topics. This decision was based on the limited information available in Chile regarding the social world of older people, particularly of those who have recently crossed the socially constructed boundary of midlife to enter into older age. Of course, this decision of privileging comprehensiveness over focus comes with some drawbacks. For instance, the different aspects of social capital or the complexity of biographical experiences influencing personal relationships in late life are only suggested but not fully examined. As mentioned earlier, a challenge in the analysis was to identify and explain gender differences, as the logic used by the study participants was similar, but their practices showed some differences. For example, both men and women indicated the important distinction between chosen and given ties to describe kin and non-kin ties. However, in practice, men mostly resorted to family ties to exchange support, while women had more varied networks of support and emotionally close

people. The approach and sample size used in this study did not allow exploring further the causes and specific implications of these different experiences.

The cross-sectional approach of this study also impeded an analysis of whether younger cohorts of men are in fact better adapted to maintain or recreate a varied personal network –thus indicating that different values and definitions influence their practices– or, instead, men tend to decrease the size and variety of their networks as they grow older due to reasons that need to be further explored. We may ask, for example, about how support exchange and emotional investment are similar or different for men and women entering old age. If, as in our sample, women are more involved in the labour market, why do they still have larger and more varied networks than men?

As indicated in the methodology, the findings are not based on intriguing but unique quotes or cases, but on the experiences of all the participants. Thus, despite the limitations, I do believe that the decision of privileging breadth over focus proved useful. It allowed us to explore the shared definitions of personal relationships and support in late life. It also enabled us to better understand the rationale of the participants to exchange help with different people and to develop networks of emotional support with more or less presence of family and non-family ties. In sum, the findings presented here provide several starting points to conduct more specific research in the future focusing on emergent aspects of older people's experiences of aging. Some avenues for such future research based on the research findings and the many questions that arise, include:

- *Altruistic help among members of personal communities.* The personal communities method was well received by study participants and supported very well by the findings from the study of social capital. Reciprocity among kin and non-kin ties can be studied by using different methodologies that help us to identify the more subtle types of help exchanged on a daily basis. For instance, we could use direct observation of older people's routines and/or personal diaries to identify those 'invisible' exchanges of help that represent altruistic forms of reciprocity.
- *Independence and negotiated reciprocity.* Future studies can compare and contrast the different narratives of independence present among family members and close non-kin ties and how these narratives influence the way in which the exchange of help is negotiated. Some questions to be explored are: When and with whom does reciprocity need to be negotiated? and, What are the similarities and gaps in different generations living in different contexts regarding the meaning and value of help exchange? The question about negotiated reciprocity can also provide a way to better understand gender differences in personal network composition and sources of support. We may ask whether younger cohorts of men and women share the same definitions regarding support and independence, as well as preferences and strategies for exchanging help with family and friendship ties.
- *Trajectories of friendship.* The different types of friendship identified can be analyzed using a life course perspective, as many friendships are created, activated or kept latent depending on the life stages and transitions faced by the person. In late life, we can explore how different friends have accompanied the older person, when and why these

friends have been put on hold or called forward. For instance we can ask: How do key life transitions (e.g. retirement, widowhood, divorce) affect friendship trajectories and friendship ties? Is this the same for men and women? Are the same types of friends important when the transition occurs earlier or later in life? How does the death of a long standing friend in late life affect personal communities?

- *Friendship developed in older people's associations.* Following Sarah Matthews' typology of friendship styles and the classifications of personal communities proposed in this thesis, we can identify the type of friendships developed and/or strengthened through participation in older people's associations. Are some types of association more appropriated for the creation of certain friendship styles? Are some types of associations more effective depending on the gender of the participants?
- *Influence of living environment on older people's social capital and personal communities.* The infrastructure of the environment in which older people live and move, and even the socioeconomic segregation reflected in city spaces, can influence their opportunities to interact and socialize with others (e.g. affordable and/or efficient public transportation, even sidewalks, accessible parks, perception of secure spaces). These issues are relevant in the Chilean context, as cities and urban infrastructure have not been planned to be accessible and improvements are largely been successfully implemented mostly in wealthy municipalities. Thus, some questions that connect the living environment with personal networks in late life are: How do more or less age friendly communities impact older people's opportunities to develop weak ties? Do age friendly communities facilitate the creation and maintenance of bonding social capital? To what extent does moving to a

new neighborhood and downsizing change older people's personal communities and social capital? How does bonding and bridging social capital work in rural and urban communities in a context of centralized services such as Chile?

- *Social capital in late life in context of low and high trust.* If we analyze different social contexts, for instance a different region or a rural area, would we find similar results regarding how bonding and bridging social capital work? How important is bridging social capital for accessing public and private services in a context where there is a higher level of institutional trust?

The current study has primarily used a qualitative methodology. Other suggested studies could use a mixed methods approach depending on their particular objective. For instance, combining a more complex close-ended questionnaire to measure social capital in late life that allow examining reciprocity among different kin and non-kin ties that form the network of relationships of the older person. This could be complemented by qualitative methods, such as walking interviews with the purpose of observe daily life interaction with the social environment, diaries and/or direct observation of daily routine and interactions to examine more subtle exchanges of help and interactions that are minimally grasped or recognized by study participants.

Another alternative for the suggested could be conducting a longitudinal study that takes into consideration the impacts on social capital of changing resources regarding use of technology, housing alternatives and living arrangements in a context of increasingly aging demographics. This study could also help to analyze how the role of family regarding older

people's care and support change over time, and whether different values and social norms shape our networks of relationships. Although ambitious, such a study could be particularly relevant for the Chilean context, as well as other countries experiencing social changes at different levels; changes that have not been systematically characterized in interaction with the rapid process of population aging. The generation of adequate and updated frameworks requires more empirical research that enable the conceptualization of late life with focus on both the influence of institutions and social structures on older people and the impact of older individuals in society, considering their own definitions, strategies and resources to manage their experiences of aging.

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## Appendix A: Interview Schedule

Date	/ /
	Day/ Month/ Year

<b>Last Name:</b>
<b>Given Name:</b>
<b>Address:</b>
<b>Phone number:</b>

Date	/ /
	Day/ Month/ Year
Code	

1. Introduction: introduce self, restate research purpose, and reaffirm confidentiality, read consent form.
2. First, I will ask you some general questions about yourself.

Age:	What is your marital status? Married      Divorced      Single Widowed      Separated      Common law		Do you have a partner? Yes No
What was the highest level of education you completed?	How many children do you have?	How far do they live from you? (time walking, driving or by bus)	
Elementary school	C	I	
High school	C	I	
Technology school	C	I	
University	C	I	
Graduate school	C	I	
How long have you been living in this community?	What is your current / was your previous occupation?		Including yourself, what is the total number of people currently living in your household?
What is their relation to you? Who is the head of the household?	Health insurance:  FONASA ISAPRE		What types of income do you receive? Ex: Pension (INP o IPS, AFP), widow's pension, salary, real state, etc.
Do you or your spouse receive any support from the state? Ex: Chile Solidario, Programa Puentes, Programa Vínculos, "bonos", etc?		Do you participate in any governmental or municipality program?	
Chile Solidario		Programa Puentes	
Programa Vínculos		"Bono"	
Otro:			

3. I would like you to think about the people who are important to you now; important for any reason. Let's write a list of those people. Could you tell me who are they?
  - What is the relationship of this person with you?
  - What does this person do for a living?
  - What is his/her age?
  - Does she/he live close to you? (time to reach your place)

4. Now, I would like you to help me with this 'map'. You can see that there are 5 concentric circles. The one in the middle is you. Thinking on how important are these people to you now, can you locate these labels on the map? The closer someone is to you the more important he/she is.
5. Now that we have this map, why have people been placed in the way you did?
6. How would you label/describe the different circles? or What is the difference between relationships in the different circles?
7. Do you feel that this map is complete now? Would you like to add someone else? (If yes, ask same question as in Q3). Also you are free to relocate people or live someone off the map.
8. We have talked about people that have helped you in the past, now, thinking about the future, who would you turn for support (Ex: practical stuff, advice, money, information)? Why?

Now, I'm going to name some situations and you have to tell me whether you have received help from someone during the last year (mark all that applies).

	<b>Household members</b>	<b>Close family</b>	<b>Other relatives</b>	<b>Neighbours</b>	<b>Friends</b>	<b>Organizations</b>	<b>Other</b>
Counsel on important issues							
Counsel on work, on work opportunities for you or members of your family							
Care due to health issues (you or a close relative)							
Help to fix something at home							
Help with your computer							
Legal advice							
Someone who is there for daily talk							
Help with transportation to go to a place far from your home (eg. hospital, grocery shopping)							
Get information on recreation and different activities							
Support in case of family problems							
Help you in case of an emergency							
Watch your house while you are away							

	<b>Household members</b>	<b>Close family</b>	<b>Other relatives</b>	<b>Neighbours</b>	<b>Friends</b>	<b>Organizations</b>	<b>Other</b>
Small economic support (in Money or goods, ej. Ch\$5,000 –CA\$10-, food)							
Larger economic support Apoyo económico más grande (in Money or goods, eg. Ch\$50,000 –CA\$100-, a refrigerator)							
Accompany you to an event							

(Also ask: Why do you think those people asked you for help in these situations? Could you give any examples?)

9. So now let's look at this question in the reverse. I going to mention different situations and you have to tell me whether YOU have helped someone in the last year (mark all that applies)

	<b>Household members</b>	<b>Close family</b>	<b>Other relatives</b>	<b>Neighbours</b>	<b>Friends</b>	<b>Organizations</b>	<b>Other</b>
Counsel on important issues							
Counsel on work, on work opportunities for you or members of your family							
Care due to health issues (you or a close relative)							
Help to fix something at home							
Help with your computer							
Legal advice							
Some who is there for daily talk							

	<b>Household members</b>	<b>Close family</b>	<b>Other relatives</b>	<b>Neighbours</b>	<b>Friends</b>	<b>Organizations</b>	<b>Other</b>
Help with transportation to go to a place far from your home (ej. hospital, grocery shopping)							
Get information on recreation and different activities							
Support in case of family problems							
Help you in case of an emergency							
Watch your house while you are away							
Small economic support (in Money or goods, ej. Ch\$5,000 –CA\$10-, food)							
Larger economic support Apoyo económico más grande (in Money or goods, ej. Ch\$50,000 –CA\$100-, a refrigerato)							
Accompany you to an event							

(Also ask: Why do you think those people asked you for help in these situations? Could you give me an example?)

10. Going back to the map, with whom do you feel you have more things in common? What type of things?
11. Do you have a friend that you consider as a family member?
12. Do you have a friendship relation with any of your family members? How is that relationship different to the one you have with other family members?
13. Do you think that your friends give you something different to what your family gives?
14. Do you think that your family gives you something that your friends cannot give you?
15. Do these people know each other?
16. Are they friends of each other?
17. Do some of them meet as a group? When? Could you give me an example?
18. Are there situation where you would rather to resort to your friends, neighbours or other people before asking for help to your close family?
19. What should a person do for you to change his/her position on the map, to locate him/her further from the centre or even outside? (Try: what should a person do to you so that you stop trusting on her/him? Are there any differences between family members, friends, acquaintances?)
20. Under which circumstances do you believe that children MUST help their parents? Are there any exceptions?
21. Select a of the situations from the previous questions and ask:
  - What did you feel when you received that help?
  - Would you have preferred that somebody else had helped you with that? Why?
22. Would you agree with the following statements?

	<b>Strongly disagree</b>	<b>Disagree</b>	<b>Agree</b>	<b>Strongly agree</b>
You can trust most of the people				
You need to be very careful when dealing with people				
You can trust in young people in your community				
You can trust the majority of people in your community				
There are groups in this community I don't trust				
You can trust in young people (in general)				
You can trust in the police in this community				
You can trust that the major and other authorities of the Municipality answer to the needs of the community				

23. Now, thinking about organizations that work on issues related to older people in Chile. Would you say that you can trust in:

	<b>Always</b>	<b>Fairly often</b>	<b>Almost never</b>	<b>Never</b>
Public clinics				
The municipality to get help with what I need				
In FONASA <input type="checkbox"/> / Isapre <input type="checkbox"/>				
In the Centre for Older Adults				
Caja de Compensación				
Neighbours association				

24. Have you faced a situation where you have to resort to family or friends to solve a problem that you could have solve through an organization?

25. Do you think that is hard to meet new friends during old age?

26. Finish: Are there anything you would like to add?