

A Formal Statement of Disengagement Theory¹

Definition

Disengagement is an inevitable process in which many of the relationships between a person and other members of society are severed, and those remaining are altered in quality.

Postulate 1: Although individuals differ, the expectation of death is universal, and decrement of ability is probable. Therefore a mutual severing of ties will take place between a person and others in his society. (The word "society", here and throughout, refers to those concrete cultural groupings and social systems to which the individual belongs, actually or symbolically.)

When most of the relationships connecting a person to his social system are severed, disengagement has occurred. Death itself is, of course, the only total disengagement, but the fully disengaged condition of the living can be considered to exist when only those bonds necessary to sustain life remain.

Corollary 1: Because people differ in physiology, temperament, personality, and life situation, disengagement occurs earlier for some people than for others. Furthermore, the precise number of bonds broken, and the number remaining, differ from person to person.

Corollary 2: Because of the differences among people, qualitative changes that occur in relationships with the people to whom the aging individual is still bonded will vary from person to person.

Postulate 2: Because interactions create and reaffirm norms, a reduction in the number or variety of interactions leads to an increased freedom from the control of the norms governing everyday behavior. Consequently, once begun, disengagement becomes a circular, or self-perpetuating, process.

All social interaction is rooted in norms, and reaffirms those norms. If interactions become sparse, the control of the individual weakens. Thus, elderly people who have become eccentric in their style of interaction, because they have few normatively governed relationships, find it hard to relate to people who did not know them before they became eccentric. They cannot find common ground with new acquaintances. This means that since they find it difficult to replace friends and acquaintances lost through death, their society becomes even smaller, they turn more into themselves, the normative control over them weakens further, and they are even less able to relate to strangers—or even their own kin, if they have been at a distance—and the disengagement process, once started, becomes self-perpetuating.

Postulate 3: Because the central role of men in American society is instrumental, and the central role of women is socio-emotional, the process of disengagement will differ between men and women.

The characteristic role of men requires mechanical skill or technical knowledge, and it carries them away from home into the occupational world. The task of husband-father-worker with regard to the family is primarily that of preventing it from disintegrating because of inadequate economic relations with the environment, even though his occupational obligation is only the appropriate technical performance of his role. He articulates the family to the community by endowing it, through his occupation, with a status in the class structure.

The characteristic role of women requires skill in creating a tension-free environment, and knowledge of the norms and values of society. The task of a woman with regard to the family is primarily that of reducing among the members tension developed in the course of instrumental activity under conditions demanding considerable control, and of reinforcing the family values and norms. She maintains the integrity of the family against disrupting tensions developed from within, and she reinforces the norms governing the attainment of family goals.

Disengagement from the central life task will differ because the relinquishing of all of an activity—one carried out in a particular place, under specific rules of conduct, and judged by definable criteria of performance—is qualitatively different from relinquishing the main burden of an activity, while keeping a style of interacting that remains appropriate until the very end of life.

Postulate 4: The life cycle of the individual is punctuated by ego changes—for example, aging is usually accompanied by decrements in knowledge and skill. At the same time, success in an industrialized society is based on knowledge and skill, and age-grading is a mechanism used to insure that the young are sufficiently well trained to assume authority and the old are retired before they lose skill. Disengagement in America may be initiated by either the individual because of ego changes or by the society because of organizational imperatives, or by both simultaneously.

The ego is a product of experience. Because experience changes in quality and in amount, the ego also changes. It is also possible that there are some inevitable ego changes "programmed" into the development of the organism, which occur regardless of any but the most extreme experiences. Maturation is one such change; disengagement may be another.

In modern industrial society, positions in the occupational world are allocated on the basis of universalistic criteria of performance, and not on particularistic criteria of either biological or cultural heredity. This means that the young must be trained and the old retired before their knowledge is obsolete. Age-grading is one of the mechanisms through which this is accomplished. To say that someone is "old enough to retire" is not to comment on the obsolescence of his particular skill but upon his membership in an age echelon.

The individual may initiate the disengagement process because he has experienced ego changes that rob him of motivation for maintaining some of his bonds with others. On the other hand, society may initiate disengagement because the individual belongs to an age grade that is considered, on the whole, too trained in skills too obsolete for adaptation to modern conditions. This avoids invidious comparisons between individuals, but sometimes returns valued members with usable skills. In the case of a woman, once her family is grown, some of her skill at homemaking, cooking, and baby care may, in American society, be considered obsolete.

When the individual's readiness for disengagement coincides almost exactly with society's readiness to release him from his main commitments, the ideal case of simultaneous disengagement occurs.

Postulate 5: When both the individual and society are ready for disengagement, completed disengagement results. When neither is ready, continuing engagement results. When the individual is ready and society is not, a disjunction between the expectations of the individual and of the members of his social systems results, but usually engagement continues. When society is ready and the individual is not, the result of the disjunction is usually disengagement.

Inner ego changes may occur before the individual reaches the age where his echelon is normally retired. More commonly, in affluent American society, the echelon reaches retirement age before the individual has experienced sufficient inner change to prepare him for disengagement.

Corollary 1: If society is ready to disengage from the individual before he is ready to give up his central role—more the case for men than women—or if the individual is ready and cannot get permission—more common among women than men—lowered morale can follow.

Corollary 2: If society dispenses with the skills of an individual, but he is not, himself, ready for disengagement, he may re-engage himself through a different set of skills. Bertrand Russell is an excellent example; he has been engaged with the world consecutively as mathematician, logician, educator, social philosopher, historian of philosophy, moral and political philosopher, and, finally, as a writer of fiction.

Corollary 3: If the individual is ready for disengagement before society is, and if he has disengaged himself "prematurely," then society may try to re-engage him. During a national crisis, such as war, many disengaged individuals reengage, some reluctantly, because of an appeal to their duty to country.

Postulate 6: Because the abandonment of life's central roles—work for men, marriage and family for women—results in a dramatically reduced social life space, it will result in crisis and loss of morale unless different roles, appropriate to the disengaged state, are available.

Corollary 1-A: Men face three problems of disengagement: membership in a peer group is lost, instrumental tasks through which to relate themselves to society are lacking, and status identity is lost. The first problem arises, in an age-graded society, because men have depended upon work for peer relations, the second because they have no purely sociable skills and must mediate relationships through instrumental activity, and the third because they have acquired their socioeconomic status through their occupational identity.

Corollary 1-B: The solutions to all of these problems will eventually arise from ego changes leading to preoccupations with inner states and to the narcissism of the very old. Temporary solutions to the first problem are provided by certain recreational groups and by kinsmen; to the second problem by voluntary instrumental activity, by temporary, short term, or part-time, re-engagement with the occupational world, and by recreation that has instrumental aspects. The solution to the third problem resides in Passive Mastery, which leads to satisfaction with what has been, rather than a pride in what is.

Corollary 2-A: Women face three problems of disengagement. Upon being widowed, they lose a highly cathected—whether negatively or positively—spouse, they lose the status derived from their husband's occupation, and they shift from obligatory to voluntary relationships.

Corollary 2-B: The solutions to all problems, as with men, need to be temporary only, because none of them remain problematical for the very old. To the first problem there is probably no true solution short of remarriage, although cathexis can, perhaps, be distributed among a group of kin. To the second problem the solution is usually automatic; widows are given enough special consideration in this society to compensate for loss of status. The third problem is also easy to solve for women, because the higher death rate among men leaves an available peer group of widows. Furthermore, after the shock of bereavement has passed, membership in such a group allows a kind of non-obligatory, horizontal, peer relationship compatible with the process of disengagement.

Postulate 7: (a) If the individual becomes sharply aware of the shortness of life and the scarcity of the time remaining to him, and if he perceives his life space as decreasing, and if his available ego energy is lessened, then readiness for disengagement has begun.

It seems probable that disengagement would be resisted forever if there were no problem of the allocation of time, and thus no anticipation of death. Questions of choice among alternative uses of time lead to curtailment of some activities. Questions of the inevitability of death lead to introspective reflections on the meaning of life.

(b) The needs of a rational-legal occupational system in an affluent society, the nature of the nuclear family, and the differential death rate lead to society's giving echelons of people its permission to disengage.

The requirement of specific skills (Postulates 3 and 4) leads to the retirement of groups of men, regardless of the skills of any given man. The self-limiting characteristics of the socialization process mean that children grow up, leave home, and relieve the mother-wife of half of her role. The preponderance of male deaths over female deaths means that many women finally disengage from their central role through widowhood (Postulate 6).

Postulate 8: The reductions in interaction and the loss of central roles result in a shift in the quality of relationship in the remaining roles. There is a wider choice of relational rewards, and a shift from vertical solidarities to horizontal ones.

As mutual, obligatory relationships decrease, the affectively neutral orientation necessary in the working world can be abandoned, and the diffuse, emotional, but responsible attitude necessary for the socialization of children can be abandoned.

Horizontal solidarities, being composed of similar units, are less interdependent, less demanding, and more optional than vertical solidarities, which, because of differences in role specifications, ability, and power, require mutual responsibility.

Corollary 1: In American society, those people who have high prestige and considerable power associate their image of their own success with the taking of responsibility and the management of hierarchical relationships. Therefore, the shift to the non-obligatory, egalitarian horizontal relationship is a serious disjunction for them; for this special class, retirement is a trauma.

Postulate 9: Disengagement is a culture-free concept, but the form it takes will always be culture-bound.

In American society, disengagement is more difficult for men than for women. In societies like classical China, which was traditional and patriarchal, and therefore valued wisdom, the role of the men merely shifted with age, and they became, in some ways, even more engaged as they became older. In some nonliterate societies, especially those with scarcities of food, disengagement is coincident with the loss of instrumental ability.

¹Cumming, E. and Henry, W. E. Growing Old: The Process of Disengagement.
New York: Basic Books, Inc., pp 210-218.