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RÉSUMÉ

La coïncidence de retraite et du vieillissement, éprouvé dans les étapes ultérieures de la vie, peut déclencher une récurrence des tensions bipolaires des étapes antérieures décrites dans le modèle du développement de la personnalité d'Erikson. Le modèle fournit un moyen pour les retraités de comprendre comment le motif de leur identité actuelle a developpé et comment les psychodynamiques des étapes antérieures de la vie peut être reactivé par le début simultané de la retraite et du vieillissement. Les étapes de la modèle sont illustrés par des experiences dans la retraite. L'utilité du modèle d'Erikson est suggerée comme un moyen d'améliorer la conscience et la connaissance de soi et l'adaptation à la retraite.

ABSTRACT

The coincidence of retirement and aging, experienced in the later stages of life, can trigger a recurrence of the bipolar tensions of earlier stages described in Erikson's model of personality development. The model provides a means for retirees to understand the ground from which their present identity has developed and how the psychodynamics of previous life stages can be reactivated by the onset of retirement and aging. Stages of the model are illustrated by experiences within the context of retirement. The utility of Erikson's model is suggested as a means of enhancing self-awareness, self-understanding, and adjustment to retirement.

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This commentary is prompted by the view that Erikson's developmental model can provide a means of understanding and coping with various identity challenges that confront increasing numbers of retirees. Discussion of some of the challenges to identity that people may face in retirement is intended to alert and prepare them, and interested parties, for such encounters. The primary focus here is on the relevance of the first seven stages of Erikson's model to retirement. Some early identity stages recur in later life, although initial experiences of some later stages of the model (e.g., mid-life) tend to be coincidental with the decision to retire and its repercussions. Retirees' experiences discussed here are based partly upon feedback from retirees who participated in workshops that I conducted. Descriptions of pre- and post-retirement phenomena are also drawn from various studies in the retirement/aging and psychiatric literature.

A key challenge that many, if not all, retirees encounter stems from the role they filled during their working years because workers' identities are often closely related to their employment (Antonovsky & Sagy, 1990). Consequently, the absence of an occupational role can be a severe threat to a retiree's sense of identity. The lack of a job can also involve the loss of aspects concerning the workplace that were peripheral to a retiree's job but were nonetheless important features of the overall work context. For example, there may be losses of social and recreational activities with fellow workers, a shared history with other workers, pride in and respect expressed for a worker's competence, the stimulation and challenge of the job, and perks that were part of the job such as a secretary or company car.

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For many workers, their job is the hub of their working years' lifestyle because it occupies so much of their existence. Involvement with family, friends, recreations, hobbies, and so on is often fitted around employment. However, the social interaction of the workplace is also part of a worker's social life. For many retirees, such peripheral but important aspects of the workplace can be overlooked until they are missed following retirement.

Now that old roles and behaviour patterns must be abandoned or modified, retirees may face the difficult task of finding new sources of identity to replace those lost to retirement. Future retirees are often advised to develop a diversified portfolio of "selves" so that despite losing some selves to retirement, others will be available to fill the gap. Some of these alternate selves (e.g., family roles, club involvements) will continue into retirement and may grow to be as prominent as those aspects of identity that were job related.

The principle of continuity suggests that what people have done in the past indicates with high probability what they will do in the future. This situation has its positive side in that many aspects of retirees' personalities and behaviour will continue to function in retirement. The presence of identity assimilation (seeing one's experience of the world as compatible with one's identity) and accommodation (making adjustments in order to achieve compatibility of identity and experience) can contribute to a balanced identity over time that does not swing between two extremes: either denial of the need for adjustment or excessive modification (Whitbourne, 1986).

The terms self-concept and identity are often used synonymously. *Identity* tends to refer to how we see ourselves whereas *self* is primarily determined by how others see us. This division might also be labeled as "personal identity" and "social identity" (Deaux, 1992). Nonetheless, this distinction is somewhat arbitrary. Although each human's existence appears to have constancy over time in that it is the same person, the human body is in a state of continual, if not continuous, change (e.g., aging). This reality makes acceptance of a static identity doubtful, but as Whitbourne (1986) suggested, some aspects of individual identity might be relatively stable over time (e.g., some personality characteristics).

If, in people's lives, episodes occur in which people feel they have lost their bearings, they may experience a potential identity crisis. Such an episode can result in a break from habitual routines that can accompany the loss of familiar roles such as being a parent (e.g., empty nest syndrome) or a worker (e.g., retirement). Mid-life and retirement are two periods in which one phase of life wanes and, to replace that phase that becomes lost or diminished, other selves and sources of meaning are needed. Note that patterns of changes in identity are not necessarily correlated with age; nonetheless, certain psychological crises do tend to occur within particular age ranges (e.g., mid-life crisis and retirement). One example is a necessary change in the parenting role that occurs when children reach adulthood. Aging, as another example, can bring physical limitations or outright elimination of some activities such as hard labor or playing contact sports.

Although retirees may have developed an identity during adolescence and young adulthood, as described in the Identity versus Role Diffusion stage of Erikson's model of personality development, retirement can cause individuals to once again struggle with identity issues. However, the identity issues experienced as people enter retirement occur within a quite different developmental context compared to identity issues experienced in young adulthood. The identity that revisits the Identity versus Role Diffusion stage of Erikson's model in retirement will be different, even though some unresolved identity issues might be a legacy of earlier years. If, as Antonovsky and Sagy (1990, p. 364) maintained, "for almost all, the job, the fact of going to work, was one's key to social legitimacy", then identity problems can be a consequence of retirement.

Retirees can be surprised by the ways in which retirement adjustment can evoke past issues, such as identity. This possibility is heightened for those who have relied upon assimilation as a favored means of preserving identity and who also tend to use an emotion-focused, rather than problem-focused, means of coping with change (Whitbourne, 1996). An example is the tendency of some retirees to engage in self-deception by rationalizing incompatible feedback about their identity as being compatible because they are apprehensive about change. Self-awareness is a critical influence on an individual's ability to assimilate or accommodate feedback, especially feedback received from their social environment.

Reviewing those factors that influenced the development of one's personality in previous stages of life is not necessarily an action taken by all retirees. Taking stock of one's life upon becoming a retiree, however, is a common phenomenon. Erikson's model can provide a framework for understanding the emergence of personal identity and its dynamic nature throughout the lifespan. Retirees' reflections upon the past can take various forms. Some may be consumed by nostalgia while others can be troubled by regret for lost opportunities. Some may never have been interested in or conscious of formative psychological influences upon their personality development; others may

be aware of critical incidents in their personal history but unaware of how those incidents have affected their personality. Other retirees might be aware of such influences but have made the wrong attributions of how certain episodes shaped their identity. Increased awareness of how one's identity has developed might better equip present and future retirees to understand and cope with the challenges to identity that are triggered by retirement. Adjustment is not so much a regression, in the Freudian sense, as it is an updating of the foundations of identity laid in prior years of the life cycle.

Erikson's (1963) model covers four groups of developmental stages that progress through (a) infancy (Trust versus Mistrust, Autonomy versus Shame & Doubt); (b) childhood (Initiative versus Guilt, Industry versus Inferiority); (c) adolescence (Identity versus Role Confusion); and (d) adulthood (Intimacy versus Isolation, Generativity versus Stagnation, Ego Integrity versus Despair). Passage through these stages shapes the formation of people's identities and personalities. Perhaps Erikson's model can be seen in terms of a repetitive process whereby one revisits earlier stages when challenged by circumstances that re-test retirees' prior resolutions of those stages. The re-examination of past crises is also compatible with the common practice in psychotherapy of exploring early childhood and family-of-origin events that may shed light on the development of people's personalities and current psychological difficulties. Erikson's model may provide significant utility in terms of helping retirees increase their self-awareness, self-knowledge, and self–other understanding. Although it is a stage model tied to age, Erikson's acknowledgement of the need for flexibility in applying the model is compatible with the view presented earlier that identity is in a continual state of flux depending on the nature of persons' lived experiences.

Logan's (1986) re-conceptualization of Erikson's developmental model considers the Identity versus Role Diffusion stage to be pivotal. It is both a culmination of the development of early personality and the beginning of a reprise of these early stages as people enter the later stages of the lifespan. The first five stages (from Trust versus Mistrust to Identity versus Role Confusion) are revisited within the context of late middle-age and early old-age experience. At this point, the integration of personality that was achieved in adolescence usually requires modification as a result of the impact of aging, retirement, health issues, and changing psychosocial factors.

Logan's (1986) identification of existential themes within his revision of Erikson's model is compatible with the view that identity is subject to existential issues throughout the lifespan (e.g., teenage identity may no longer be appropriate in old age). The issues to be either faced or neglected by retirees include questions about which roles and identities are appropriate after those roles associated with pre-retirement have passed or have less relevance. Because retirement often prompts a life review, other existential issues draw more attention at that stage whether or not retirees have fulfilled the goals related to their careers, family lives, and social relationships. An increased awareness of being closer to the end of life can trigger questions about the very meaning of human existence. Human mortality becomes more difficult to ignore as the inevitable end of existence. This is especially true for retirees who outlive their contemporaries. Death anxiety is also accompanied by the anxiety of fate, not knowing when or how one will die. There is also the possibility that guilt, following a less than satisfactorily lived life in the eyes of retirees can lead to self-condemnation and depression (Tillich, 1952).

Although individual identity issues vary, one existential theme seems to be common among retirees' experiences. Hollis (2005) captures the drift of this phenomenon:

> Who am I apart from the roles I have been playing – some of them good, productive, and consistent with my inner values, and some not? … What, in short, is the second half of life about – the time today between thirty-five and nearly ninety years – if it is not to repeat the script and expectations of the first half of life? (p. 22)

It is ironic that many future retirees look forward to being free of their jobs, but once retired, they begin to appreciate how much of their identity, especially for males (Szinovacz & De Viney, 1999), was intertwined with their work. The loss of relationships, challenges, and activities associated with their work can be painful losses that many people overlook as they contemplate retirement. The prospect of relief from a demanding or unsatisfying job in exchange for the prospect of freedom to do other things can be irresistible but is not necessarily lasting. Choice dilemma can be a problem when it comes to the question of, What will I do with my life from now on? As new retirees look back on their lives from the immediate present, they may ponder other questions:

> I have done the expected things, according to my best understanding of myself and the world, so why does my life not feel right? These are painful questions, and all of us, sooner or later experience this discrepancy between what we sought, served, and accomplished, and what we feel in our private honest moments.(Hollis, 2005, p. 27)

Some limited examples of how the model can be interpreted within the context of retirement for the first seven stages of Erikson's model follow.

Experiences of Erikson's Model in Retirement

Stage One (Trust versus Mistrust)

The changes, particularly losses, resulting from retirement can create a feeling of uncertainty about a future in retirement. The void left by the absence of not only work but also much of the peripheral social activity associated with the workplace can create doubt as to how life in retirement will turn out. It is similar to "buyer's remorse." Retirees might ask themselves: Can I trust myself to make the right decisions? Not knowing whether deciding to retire is the right choice can create self-doubt and anxiety resulting in avoidance and delay. Many people do not retire when they planned to do so (Anderson, Burkhauser, & Quinn, 1986). Financial problems or decision paralysis are two reasons for such a change in plans. Anxiety about trusting oneself to make the right decision often leads to procrastination of retirement plans, and conversely to the possibility of an impulsive decision to retire. At this time in life, people who have a good track record of decision making will probably feel confident about deciding and coping with their future. If anxiety is high and self-confidence low, however, people might be unwilling to trust themselves to make good decisions. The phenomenon of decision paralysis is likely to continue well into retirement when even more choices must be made.

The inertia of being employed must be broken by making one of the most important decisions that most workers will make in their lifetimes. Erikson's original context focused on the experience of the child in the hands of caregivers whereas, in the case of retirees, the object of possible mistrust or trust can be the retirees themselves. Mistrust can lead to identity diffusion as outlined in Erikson's model. Personal mistrust may also reduce future retirees' decision-making autonomy even if they have consulted professional retirement advisers.

Stage Two (Autonomy versus Shame and Doubt)

No longer being a breadwinner can lead to feelings of shame for a retiree, especially if a relationship partner is still working. However, if a partner chooses to continue working for reasons of meaningful engagement rather than for financial necessity, shame is probably not an issue. Nevertheless, some retirees may still feel shame or discomfort because they are not doing what they have done habitually for so long. Going to work, being engaged, and being productive embody traditional values that may take time to fade, especially if these activities have high intrinsic value in terms of personal meaning. Such values can create ambivalence for those who are making the transition to retirement. The avoidance of shame caused by wrongly perceived dependency on a partner may also motivate some retirees to seek part-time employment.

Increasing age often brings increased fear of too much dependency on caretakers be they relationship partners or professionals. Inability to take care of oneself with increasing age can bring feelings of shame and guilt. Physical dependency restricts life choices and can overburden caretakers. The deterioration of vision, hearing, and memory can also threaten personal autonomy. The possibility of incurring the wrath of caretakers for the inability to control bodily functions can also be a source of potential shame.

Stage Three (Initiative versus Guilt)

After the initial excitement of being retired, people may settle down to making necessary adjustments. Some find that a busy schedule of recreational activities does not provide long-term meaning. But the question arises: What do I do in retirement apart from recreations, hobbies, and travel?

Perceived exile from the former workplace can produce feelings of powerlessness and isolation. Now that retirees no longer have the backing of a job to enhance their credibility in their area of expertise, they may find themselves in no mood to "chase ambulances" again in order to find full- or part-time work. Underlying the attempt to find new activities and projects to replace those lost to retirement is a feeling of having gone through the work-life cycle once and a resistance to having to work hard, be it paid or unpaid, to develop new projects. These feelings make it more difficult for a retired person to look for projects and activities that are not a rerun of what they have already accomplished. The loss of the stimulation and meaning provided by their former employment, however, may draw some retirees back to their former work role, either in a part- or full-time capacity.

The basic question of What do I do with my retirement? can be difficult to answer. Some retirees find that taking it easy only prevails for a while until dissatisfaction mounts and the search for some meaningful activity occurs. The search is made more difficult by the large number of possibilities from which choices can be made. Because this choice dilemma occurs in the afternoon of life, it may not be faced with the enthusiasm of a younger person who is just beginning a career.

Time frames initiatives differently in later life. Having expended so much energy in earlier life, retirees may be less willing or unable to summon the energy and enthusiasm for a twilight repeat of earlier life initiatives. As retirees gaze upon the accoutrements of their prior employment, such as tools, books, and credentials, they

may struggle to come to terms with the probability that these will no longer be needed. These props of a past life can evoke nostalgia and grief for the end of a career even though they may be retained in the faint hope that they might once again become useful.

Nonetheless, there are those retirees who do not encounter this weakening of initiative. Some elders do not retire. Others shift to part-time work and thereby avoid some of the difficulties experienced by those who leave their former careers completely behind. Because of the high value placed on work and effort in North American society, those retirees who have problems developing new initiatives may experience guilt about whether they are doing enough. But, it can be difficult to follow through on initiatives once a person has become a "senior" and thereby expected, in the eyes of many, to confine him/herself to lives centered on recreation, relaxation, and travel.

The coincidence of aging and retirement can reduce the kind of motivation to achieve what may have characterized retirees' younger years. It is important, nevertheless, for retirees to search for meaningful projects and recreational activities, be they old or new. Meaningful initiatives in later life are different from those of the earlier stages. If retirees' finances are adequate, meaning and life satisfaction – rather than economic necessity and ambition – are more likely to be the criteria that influence their choice of activities, projects, or employment.

Stage Four (Industry versus Inferiority)

By the time people reach retirement, they have developed competencies and are leaving the workplace rather than going through preliminary preparation for entry into a career. In retirement, industriousness is optional. It is one of several choices such as taking it easy, seeking some part-time work, volunteering, recreation, and travel. Industriousness as a source of meaning is not as important as the type and quality of meaning in retirement. Retirees need to be actively engaged rather than just mindlessly involved if they are to find meaning. Busyness should not be mistaken for engagement. Busyness can be a defense against the challenge to find meaning. In retirement, Erikson's stage of Industry is almost a prerequisite for success in the next stage of Generativity. This stage often leads to activity that is instrumental in retirees'contributing to the welfare of society and future generations. Activities that are meaningful for both retirees and the recipients of their labor are desirable forms of engagement (e.g., coaching, teaching, and mentoring of youth). The stages of Industry and Generativity often overlap when revisited by retirees or by those who are approaching retirement.

Issues of competence can recur in retirement. Retirees can experience ageism and stereotypes when they become seniors. Despite evidence to the contrary, older people who want to work are often perceived as physically weak, slower, and more susceptible to absence from the job. However, older workers vary in these work performance characteristics just as workers of younger ages do (Foner & Schwab, 1981). Check-out clerks may ask robust seniors whether they need help with their groceries. Store clerks repeat instructions and raise their voices on the implicit presumption that seniors are hard of hearing or senescent. These types of well-intended social interactions can be experienced as patronizing and can create doubts for retirees about their competence as well as lead to feelings of inferiority. "Forever young" advertising (e.g., anti-aging cream) is another negative influence upon the psyche of older citizens.

Stage Five (Identity versus Role Confusion)

In later life, the bipolarity of identity versus role confusion may appear to have lost some of its earlier relevance to the life cycle – personal identity has been previously formed. Nonetheless, the balance between being an authentic individual and yet also being a member of society is an ongoing process. For those retirees whose identity was defined almost exclusively by their job there can be an identity crisis. They are no longer a part of their workplace community. For women, identity problems caused by retirement may add to or be consolidated by their children leaving home (i.e., the empty nest syndrome). The loss of membership in the work community means the loss of that part of identity that was formerly associated with that community. Retirees no longer enjoy the validation of their workplace identity and the security that it created.

The downside of being a part of any community is the pressure to conform to values of the community rather than be a completely authentic individual. Retirement removes the habitual structure associated with the workplace. Retirees are left to face temporal and activity voids resulting from job loss. For some, this is a new experience that can lead to uncertainty, anxiety, and even depression. However, retirees now have the opportunity to become more openly authentic and self-directed. The meaning provided by the prior work/life structure, whose centrepiece was work, has to be modified. The challenge to find meaningful engagement in retirement can become the centrepiece of post-retirement life. Life satisfaction is often affected by one's success or failure in responding to this challenge. The contexts within which meaning is found will involve the roles that will help form or sustain post-retirement identity and membership in communities beyond the workplace. Some of these roles will

be a continuation of involvement in activities that occurred outside the workplace prior to retirement. Nonetheless, responding to the challenge of adjusting one's identity in retirement sometimes leads to the sort of crisis described by Willing (1981):

> … precisely at the time he turns to consider his unshaped future, he is like an electric appliance after the plug has been pulled. He has become a deactivated mechanism: There is a zero reading on the dials that used to measure his productivity, potential for further achievement, career progress, his influence, authority, and responsibility. This is the worst of all possible times for creating a sensible program, and the process of doing so is itself a wounding experience. For the first time he begins to think (to continue the machine analogy) not in terms of the functions he can perform but of the salvage value of his parts. (p. 47)

Stage Six (Intimacy versus Isolation)

Logan's (1986) discussion of the resolution of this stage indicates the pervasive importance of basic trust and autonomy. When revisited by retirees, this stage occurs within the context of retirement rather than young adulthood. Issues of fusing one's identity within an intimate relationship and yet maintaining autonomy continue. The resolution of this stage has long been influenced by the romantic view that two can merge into one and thereby find bliss. Erikson's original intention was to address the readiness of young adults for love, marriage, and family. But many changes have occurred in current living arrangements for both couples and families. With more women working and fewer women being exclusively housewives, the balance between independence and dependence has significantly changed couples' relationship patterns. Couples are often forced to accept more independence in their relationships as a matter of economic necessity. Dependency and co-dependency can result in stresses that can end a relationship. Sometimes the degree of independence in a relationship can also lead to physical separation (e.g., a professional couple who work in different cities rather than choose other options). These types of issues can be carried into and even exacerbated by retirement.

When there is an age difference within a couple, one person might be retired while the other is still working. Women may be reluctant to retire until necessary if they have spent earlier years in raising a family but are now engaged with their careers. For retired older male partners of such women, the prospect of "home alone" and "cabin fever" may result unless the partner is willing to live more independently. Also, women who have stayed at home may have developed a life, apart from their partner, that they wish to continue even when their partner retires.

The balance between intimacy and isolation is important for a variety of living arrangements. However, transition to retirement begins a new lifestyle that can change the nature of past patterns of intimacy and isolation. A couple probably needs to make adjustments such as the acceptance of increased mutual independence in retirement if their retirements are not concurrent.

The urge to merge is often motivated by the need for security or the lowering of anxiety regarding the tenure of a relationship. There is also the magical belief that this merging will bring a healing that solves many personal problems. Yalom (1980) has used the analogy of the A- frame building to cast doubt on this myth. When one side of an A-frame building collapses, the other side collapses with it due to mutual dependency.

Research based upon socio-emotional selectivity theory (Carstensen, Gross, & Fung, 1997) suggests that as people age they may prefer fewer but closer friends whose company they enjoy. As a result, there could be more time spent in solitude unless retirees spend more time with fewer friends. For some retirees, gone are the days of casting a wide social net in order to trawl for acquaintances that may become potential friends. There is also the distinct possibility that retirees who move to a distant new residence will not have a shared history with new friends formed in that location. The "social convoy" (Kahn & Antonucci, 1980) of which they were a part in their previous community is left behind. This can become an additional loss to those already triggered by retirement.

A possible solution to the dangers of co-dependency in retirement is the existence of "my world," "the other's world," and "our world." The paradoxical value of separation actually strengthening closeness in an intimate relationship (Erikson's stress on trust and autonomy) is captured in John Bayley's (1999) biography of his wife, Iris Murdoch:

> The solitude I have enjoyed in marriage, and I think Iris too, is a little like having a walk by oneself, and knowing that, tomorrow or soon, one will be sharing it with the other, or equally perhaps again having it alone. It is a solitude, too, that precludes nothing outside the marriage, and sharpens the sense of possible intimacy with things or people in the outside world. (pp. 36–37)

Stage Seven (Generativity versus Stagnation)

This stage can be described as a commitment to helping children and contributing to the well-being of the community versus narrow self-interest. Most retirees have already passed through the age range where this stage occurs (mid-life). It is also a stage where initiative and industry of early stages recur. Many retirees have already been heavily invested in the welfare of

their children and grandchildren. Erikson's concern at this stage is that an investment be made in terms of time and energy to help children develop in a way that will lead to a well-adjusted society in the future.

Some retirees may feel that they have done enough by raising their own children whereas others look to volunteer for organizations that are focused on the well-being of citizens. Many retirees are likely to be involved in caregiving for a spouse, elderly parents, children, grandchildren, or friends. Some are likely to feel that they are already contributing to society in this way without going outside their family circle.

Those who volunteer to help children and others may find volunteering fulfilling or disappointing. People with specific skills may be asked to do jobs that do not match their skill set. Permanent employees of various social agencies can feel threatened by the competence of some volunteers – there is the possibility that volunteers could displace the employees. If volunteers are stuffing envelopes or delivering flyers, they may find that such tasks lack meaning and eventually withdraw. The challenge is to find a desirable balance of a situation in which retired volunteers can help their communities and also find meaning. If tasks lack meaningful engagement, they will probably not be conducive to well-being and feelings of competence established earlier in a retiree's life cycle.

Conclusion

The relevance of the crises expressed in stages of Erikson's model continues beyond the lifespan period in which they first occur. Logan's (1986) emphasis on the pivotal importance of the Identity versus Role Diffusion stage of Erikson's model, and on the recurrent importance of the first two stages of Trust versus Mistrust and Autonomy versus Shame and Doubt, fits the experiences of retirees as already described. A major implication of this commentary is that although there may be certain developmental stages related to ego integrity, identity, and selfhood, which occur in Eriksonian stages leading to early adulthood, they are not exclusive to that part of the lifespan. Coping with identity issues can be challenging for retirees, given that aging and retirement overlap.

As Erikson acknowledged, identity issues faced in the early stages of life can recur, especially when people have reached mid-life and retirement. This commentary has attempted to illustrate, with some examples, how relevant this aspect of Erikson's model is for people as they reach retirement age. Although the contexts of retirement and the earlier stages of life differ, rebalancing the recurrence of emotional tensions first encountered in earlier life can facilitate self-awareness of ongoing lifespan psychodynamics and thereby lead to increased understanding and subsequent management of some of the challenges of retirement living.

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