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# **Marginalisation and Rural Elderly: A Shona Case Study \***

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## **ABSTRACT**

This article proposes an inductive approach to the socioeconomic status of the rural elderly which, in the Zimbabwean situation, is leading to a 'marginalisation' model of their position. This model of marginalisation complements other perspectives on development that see rural elderly, like other rural peasants, as beneficiaries of an undifferentiated process of modernisation, in which all rural inhabitants are assumed to be disadvantaged in relation to urban groups; or it sees rural elderly as no different to other groups because of their age, but like the whole population divided into classes that become disadvantaged when they lack control of the means of production.

## **Introduction**

Theories of Third World development are almost always predictions about socioeconomic reality on a macro level, and rarely descend to detail lower than that of a country. By adopting this perspective these theories often do not concern themselves with, or are not able to take account of, results and outcomes of development as they affect specific population groups such as the rural elderly. Such difficulties are justified in the Vienna Plan of Action on Aging (1982), where developmental issues are distinguished from humanitarian issues: the former perspective takes a societal stance in regard to aging populations, while the latter looks at how development has affected the welfare of the elderly themselves. It seems to me that emphasising such distinctions creates problems at the macro level, where theorising takes place without detailed analysis, whilst analyses of humanitarian issues are divorced from macro level theories of development.

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In this article I propose to offer an inductive approach to the socioeconomic status of the rural elderly, based on observations from the Zimbabwean scene that I believe lead to a 'marginalisation' model of their position. I also believe that this inductive approach will have new implications for macro level theories of development. This model of marginalisation is proposed so as to complement other perspectives on development that would see rural elderly, like other rural peasants, as beneficiaries of an undifferentiated process of modernisation; or see rural elderly as no more disadvantaged than other rural groups, but assuming all rural inhabitants disadvantaged in relation to urban groups; or see rural elderly as no different to other groups because of their age, but like the whole population divided into classes that become disadvantaged when they lack control of the means of production.

The marginalisation model I propose is also applicable to a developing economy, and is therefore very different to the models of marginalisation proposed for industrial economies such as, for example, the 'disengagement' theory of Cumming and Henry (1961).

## **Background**

### *History*

A few words on the general history of Shona society are in order before I specifically discuss the status and position of the elderly.

Zimbabwe, lying between the Limpopo and Zambezi rivers, is for most of its area a fertile plateau of between 600 to 1 000 m above sea level, with a mild climate, bounded on the west by the Kalahari desert and in the east by mountains. First inhabitants of the plateau were Khoisan hunters but Bantu-speaking peoples have been present for 1 000 years, finding the relative absence of the tsetse fly conducive to cattle production. A particular development that affected the area until the 15th century was the growth of the southern culture called Zimbabwe. This early state developed through mining and trading, but, for still little understood cultural reasons, collapsed by the middle of the fifteenth century. After this period other groups of what we call Shona peoples developed state structures, though none reached the heights of the Zimbabwe state. Contacts grew with Portuguese and Arab traders who came from the east, but for the most part the Shona peoples were relatively free of external influences. This changed with colonial occupation by British settlers at the end of the nineteenth century. Initially the settlers were lured to the country (to be called Rhodesia) by dreams of gold. To carry out mining activities they relied on the local people's ability to supply agricultural produce (for barter and not for sale). As the settler economy began to exploit the agricultural potential of the country the capitalist mode of production demanded a permanent

supply of cheap labour for mining and agricultural enterprises. This was achieved through a system of taxes that forced blacks into the money economy and wage market. Measures were taken to consolidate settler agriculture and reduce the competitiveness of African agriculture through a demarcation of areas for indigenous populations, called reserves, in poorer and less fertile areas of the country. By discouraging Africans from permanent residence in towns the settler authorities attempted to enforce a policy of using the reserves as a pool of labour upon which to draw. At the same time, they maintained that reserves were a source of welfare and support in times of illness or retirement to which workers could return.

### *Society*

Shona society, like that of most Bantu-speaking peoples, is patrilineal<sup>1</sup>, and in traditional structures consisted of a gerontocracy that had political control at the level of chieftain (*nyika*), as well as at the level of village (*musha*), and of family (*mhuri*).

To start at the family level, the father (*baba*) was the undisputed and absolute ruler of his family. Children grew up in an extended family which included grandparents, parents, brothers, sisters, uncles and their children. When a man died his responsibilities for the family were taken over by the next eldest brother or cousin. In other words the inheritance system was unilineal and collateral. The deceased's eldest brother not only took over the property of the deceased, but could acquire marital rights over the widow if she was in agreement (otherwise the widow returned to her 'own' family). As the extended family grew unwieldy, and when the head of the family died, younger brothers could move to form their own family units. In this extended family system the *baba* or head of the house was the oldest member, and it was impossible for a younger man to be the family head while he himself had a *baba* living with him (Bourdillon, 1976:125).

At the higher level of village or *musha* it seems that the same principles applied, namely that power tended to be located in the senior male line. A similar feature of Shona chiefdomship means that only the elderly were chiefs, for one could not be a leader and have a *baba* alive who was also one's subject. Every family occupying part of a village was placed under the authority of his lineage head, who was himself responsible to the village chief (Randles, 1981:57). Yet there is evidence for thinking that the early rulers of the kingdom of Monomotapa did not live long into their old age. A document of 1609 refers to ritual suicide by a king if he became deformed or infirm, or even lost teeth (Randles, 1981:62). It has also been reported that ritual regicide was once practised among different Shona groups so that when the king became old or infirm he was strangled lest his physical decline affect tribal welfare. However, legal customs served often to emphasise the separateness or uniqueness of his role and it should not be assumed that ritual

homicide was practised on other elderly. Perhaps it can be concluded that traditionally the elderly in Shona society were dominant at all levels, and could have been a force for political conservatism. A seventeenth century Portuguese wrote with some disapproval of how the successor of the Monomotapa king "rejected the elders of his father's government and replaced them with men of his own generation; these young men began to influence the king and among other things, gave him the idea of killing all the Portuguese!" (Randles, 1981:64).

### *Economy*

The economic power of the king was considerable, for he could command seven days out of thirty, either in the royal fields or elsewhere. This type of tribute (*zunde*) was used as a form of redistribution, so that produce could be used for visitors or poor people at the chief's court, or even to feed people in times of famine (Sakala, 1980). Beach argues that although modern Shona traditions, collected under the special influence of the twentieth century, emphasise lack of economic differentiation and economic equality in the past, "archaeology and documents make it clear that, from the greatest ruler at Zimbabwe to the poorest slave there was a tremendous range of wealth and poverty. Thus while some families and communities were becoming richer others were collapsing as independent groups and being forced to enter the service of others as *varanda* (bondsmen) or even as slaves" (Beach, 1980:30). Yet although such economic differentiation existed, it was not a differentiation of individualised wealth where the individual community surplus was not for his or her benefit. As Elliot puts it (1975:18), "the rich farmer today in Africa, unlike his earlier counterpart, does not expect his social obligations to increase in parallel with his assets outside his own kin group or beer group". This different expectation highlights the change between pre- and post-colonial Shona society in its appropriation of surplus.

A few studies have analysed coping mechanisms within traditional societies in southern Africa, when faced with food deficits, droughts and famines (Fleuret, 1986; Cheater and Bourdillon, 1982; Zinyama, 1987). It seems that the ever present threat of disaster and drought in traditional societies, the Shona included, led to built-in adaptations. Farming systems, dietary diversity, systems of food preservation and grain storage, as well as labour migration, were all types of coping mechanisms in the face of food deficits, drought and famine that were relatively successful within certain limits in rural societies. Colonial and post-colonial changes, however, tended to undermine the effectiveness of many of these mechanisms.

From the first arrival of white settlers into the 'colony' of Southern Rhodesia, a divided country, a divided economy and a divided set of rewards developed. The first settlers to the country were attracted by the lure of gold, and mining was the central focus of the country's activities. However, as the capitalist mode of

production began to dominate, the settlers moved into commercial farming, having discovered the rich soils and favourable climate of parts of the country. At the same time measures were taken to reduce the competitiveness of African agriculture, and to ensure the plentiful and permanent supply of cheap labour from the 'reserves' (areas designated for blacks to live in) through the imposition of taxes and the forced relocation of blacks from 'European' land (Palmer, 1977; Hampson, 1985). Africans were discouraged from permanent residence in urban areas, and the legally demarcated areas of African residence and farming (invariably areas of less fertile soil and poorer rainfall) were supposed to be self-sustaining entities that provided for social security in sickness, unemployment or old age. Yet the ever-growing population of people and livestock, with few resources and no capital or infrastructure for agricultural production, resulted in mass poverty in rural areas. After the Second World War the Rhodesian economy grew and developed, but as Palmer says "the marked European prosperity of the post-1945 period was achieved, as in South Africa, as a direct result of African poverty" (1977:244).

In spite of massive unemployment and serious underdevelopment within Rhodesia, the country developed a policy of importing migrant labour to offset the 'shortage' of indigenous labour, especially in commercial agriculture and mining enterprises. This now has direct effects on the composition of the elderly in Zimbabwe, for a significant percentage were migrant workers from neighbouring states. A special commission, the Rhodesia Native Labour Supply Commission, was established in 1946, and during its peak years of operation (1953-1958) some 15 000 Africans from neighbouring countries, and a total of 86 791 workers, were recruited (Clarke, 1974:46). From 1958 until 1962 the demand for migrant labour decreased, and migrant workers were actually encouraged to return to their 'home' countries (from 1958 until 1975 some quarter of a million had done so), controls on movement of labour from reserves were increased, and labour was exported to South African mines at an annual rate of 30 000 workers.

The country's provisions for retirement benefits and pensions were limited almost exclusively to non-African workers. The 1936 Rhodesian Old Age Pension Act provided for non-contributory pensions for all non-Africans over the age of 60, but as the Social Security Officer wrote in 1944 Africans "received no old age pensions and very little in the way of relief, the general assumption being that the Reserve will support their old, sick and destitute". From the 1940s until the 1970s gratuities were the main post-employment subsistence for African industrial workers, (Clarke, 1977:12) but typically were so small as to be of little or no benefit in post-employment expenses and subsistence.

Poverty in rural areas was striking - one estimate showed that real average rural household incomes fell by about 40 per cent from 1948 until 1970 (Clarke, 1975:106). A study in the late 1970s showed that each family living in the rural areas of Tribal

Trust Lands (TTLs) needed somewhere between 27 to 250 hectares for producing enough food for self-consumption. However, the 800 000 farming families living on 16 million hectares and had an average of 20 hectares per family (World Bank, 1983:86). Thus the average availability was not adequate even on the best lands. Moreover the land distribution on TTLs was highly skewed, 70 per cent had less than 15 hectares. The same study reported one finding that at least 20 per cent of the population in Gutu, an area south of Harare, were landless, and 40 per cent of men between 16 and 30 were without land (World Bank, 1983:86). Income level estimates for rural areas show that these income levels have always been low.

What is striking is that despite poverty rural communities often subsidise the urban economy. Some elderly heads of households even remit money or agricultural produce to job seeking relatives who live in town. Urban migrant workers who do remit money to rural areas do so to provide short-term assistance to rural households and for long-term security for themselves in old age. However, it is clear that in an economy where the majority of workers earn wages below the PDL (Poverty Datum Line), these workers are unable to provide enough for their long-term retirement needs. When they return to the rural areas, they will, in turn, end up depending on the urban remittance of the next generation of workers.

### *Attitudes to old age*

Attitudes to old age in pre-colonial times can be gleaned from published materials as well as through oral tradition as garnered in proverbs or *tsumo*. As already indicated, respect for the elderly was a fundamental value in Shona society, reinforced through a gerontocratic system of political rule. The elderly were closer to the spirits, the *vadzimu*, and their physical deterioration in old age was not a matter of relevance. Senility, or declining physical or mental abilities did not lessen the respect the family accorded them. The Shona proverb *chembere ndeyembwa, yomurume ndibaba vavana* says that an elderly person should be treated with respect because he is the source of the generation now growing up. Indeed Shona culture could almost be described as patriarchal in its emphasis on the role of the 'elderly' head of the family.

Much of the political power of the elderly was of course premised on control over land and over reproduction (through arrangement of marriages). The former type of control was undermined by colonialism, and in consequence the latter control began to decrease in effectiveness.

The history of colonial expropriation starts with Cecil Rhodes, who led the British South Africa Company into the country with a royal charter allowing the company mining rights. However, gold did not prove as plentiful as the settlers had hoped, and very quickly land came to be seen as a valuable compensation for settlers. By 1902 one sixth of the country was parcelled out to the company and

to settlers. Rhodesia obtained self-government in 1923 and consolidated its racial character in 1930 through the Land Apportionment Act. This Act was the "white man's" charter and the whole foundation of racial segregation of land that was to be experienced until 1980 and Independence. After the Second World War the colony wanted more land for ex-servicemen who had emigrated and decided that the division, use and conservation of land needed further controls, culminating in the 1951 African Land Husbandry Act. From a technical point of view some of the measures, such as specification of farming practices and controlling grazing, were sound from an agro-economical viewpoint, but, because they were imposed upon a disenfranchised people without reference to social and political morality, the measures created great opposition. Compulsory resettlement and denial of the chief's rights to allocate land only exacerbated the unacceptability of controls. The right of chiefs to allocate land was returned to them in the Land Tenure Act of 1969, but this Act itself was more repressive and restrictive on the question of land ownership for Africans than any previous legislation in Rhodesia.

The early 1960s saw the emergence of what were to become the main political parties. The beginning of the armed struggle against the settler government is put at 1966 although it was not until some time later that the armed struggle really became a sustained and effective force. The two main parties, ZANU and ZAPU, were led by Robert Mugabe and Joshua Nkomo respectively. The war increased in intensity during 1972-1974, but in 1975 the nationalists suffered a setback because of internal feuding within ZANU. Once this was resolved the armed struggle against the Rhodesian forces was prosecuted with great force, using base camps in Zambia and Mozambique.

Gradually most of the rural infrastructure of the country became destroyed or inoperative, government hospital and school services were non-existent, and in towns populations were swollen with refugees. The physical, material, and moral effects on the whole population were extreme: most families had personal experience of a family member dying violently. The daily struggle for survival in rural areas could sometimes become literally a fight for survival, and one study documents these effects on old people who were living in town in destitution (Hampson, 1982). Independence in 1980 brought peace to a war-ravaged economy, and the control of political forces by the new government was designed to bring about growth and at the same time introduce equity in distribution. ZANU gradually consolidated its power so as to become in 1988 the only significant party (after its merge with ZAPU), with President Mugabe as the President of the country.

The war was in the main a young persons war, in the sense that most guerrilla fighters were very young, operating as *mujibas* (young unarmed messengers who were local) or as *vakomana* (guerrilla fighters who by policy operated in areas away



from their home districts). There was in the 1970s a large build-up of war activity. The relationship between the young fighters and elders is best described in a statement by Cde Mayor Urimbo, one of the first ZANLA guerrilla leaders (quoted in Lan 1985: 136):

"We went to the old people who said we must consult the mediums. We were taken to *Nehanda* ... We told her 'We are the children of Zimbabwe, we want to liberate Zimbabwe': she was very much interested."

According to Lan (1985:170), guerrillas initially dealt with mediums, rather than chiefs, who had been considerably discredited as a focus of resistance against the colonial regime.

"With the spirit mediums mounting a guard of honour, the guerrillas marched in and took hold of the symbols of their power. The loose and tactical affiliation of individuals to chieftaincies, long a characteristic of Shona society, allowed a transference of political loyalty from chiefs to guerrillas with a minimum of anxiety".

In the process, political authority was handed from elders to youngsters, but youngsters as *vana vevhu*, children of the soil: "the elders accepted their displacement by their juniors because the ancestors approved of the authority they had achieved" says Lan in conclusion (1985:213).

With respect to elderly control over reproductive systems through bridewealth, the post independence Zimbabwe government tried to wrest authority from parents through the Age of Majority Act (1982). According to this Act couples over 18 years old can theoretically effect a legal marriage without the permission of parental authority. Nonetheless, few young people refuse to seek parental permission and parents retain some control over marital choice, especially in a rural context where traditional authority is respected.

## Marginalisation

Marginalisation as used here will be defined as a simultaneous set of processes that tend to be associated with an increase of pauperisation, cultural and social exclusion, and low planning priority. The Shona case indicates that the processes involved in marginalisation of the elderly are sustained and reinforced by industrialisation and by selectivist and residualist approaches to welfare. The process of marginalisation also tends to result in considerable national and inter-group inequality among the elderly.

The term marginalisation does not imply that marginalisation of the elderly necessarily involves a process of retiring from employment and withdrawing from major social institutions. This is a western model that is not relevant to Zimbabwean elderly, where the majority of elderly are peasant farmers outside formal sector

employment<sup>2</sup> (see Fernandez, 1982, on South Asia), and where there has, until recently, been almost no post-retirement provisions for Africans in formal employment.

### *Pauperisation*

The evidence for the marginalisation, and increasing pauperisation, of the elderly in Zimbabwe is relatively clear, although there are considerable variations in the financial status of specific sub-groups of elderly. There are a number of ways of looking at the evidence of economic change and pauperisation among elderly Zimbabweans. One way would be to take an historical approach, and try to compare data about average earnings, crop and cattle sales, wealth indicators, remittances, pension systems, etc, over time. Unfortunately this method is limited by two fundamental difficulties, one being that true comparisons are rarely possible, and secondly that the data itself only indirectly measures elderly, for past data is almost always based on the family or the household as the unit of measurement.

Another method of measuring economic change would be to compare households or families with elderly members to those without elderly, and draw conclusions about the economic status of the elderly from these comparisons. This second method, although seemingly more attractive in that it does not face the difficulty of comparisons across time, nevertheless is not without limitations. One limitation is the serious lack of macro-information on intra-household wealth where elderly are present, another limitation assumes either that the elderly share equally in the use and distribution of wealth and assets, or else, if the rural elderly in Zimbabwe are heads of households, they have authority and ownership over the wealth. Such economic presuppositions are challenged by Sen (1984:372-4) who argues powerfully not only that there are age and sex biases in intra-family food distribution, but also that economic assumptions about what he calls the 'glued-together' family (with no individuality), the 'super-trader family' (where there are only individuals) and the 'despotic' family (where only family head makes choices) are all unsatisfactory. MacFadyen (1984: 5) also argues that consideration should be given to the greater vulnerability of the elderly in Africa to mortality and morbidity in times of famine or food deficiency. The question of intra-household disparities in, say, food consumption, income distribution, or ownership of wealth, is therefore complicated in the case of Zimbabwe elderly by the need to regard household data with some care. However, certain patterns do seem to emerge.

The most striking finding about pauperisation is the greater pauperisation of households whose elderly members are not household heads, or else those households of elderly who live alone or with elderly spouses. In Zimbabwe most peasant households are engaged in subsistence farming. A national sample survey

(Jackson et al, 1988: 41) recently reported that the mean household crop income was Z\$365, and the bottom 50 per cent accounted for as little as ten per cent of all crop incomes.

"This picture suggests a distinction between a large group, say the bottom 25 per cent, whose annual crop incomes amount to the equivalent of one month's minimum wage for an unskilled agricultural labourer (this level of crop production failing to provide for their subsistence), and the top 50 per cent who easily provide for an adequate basic subsistence and a considerable marketable surplus".

Widowed or single household heads in Jackson's survey had noticeably lower average household crop incomes at Z\$275. These households were disproportionately represented among those without livestock, they had no draught power of their own, having to rely on expensive hiring, usually after the peak of an animal's performance (Hampson, 1985: 53). Other studies report that cattle ownership increases with the age of the household head, suggesting a life-cycle development of household economies (Jackson, 1987). Yet there are important variations. While it is true that elderly headed households are likely to have more cattle, nevertheless the economic position of households with younger heads, but looking after dependent elderly, is poor. Such households who care for elderly are less likely than others to have access to agricultural loans, less likely to have cattle, and more likely to be poorer (Hampson, 1985).

Another notable sub-group within elderly are those who live alone. Bennett *et al* (1967) observed this phenomenon in East Africa from a sociomedical perspective, and later studies have examined the economies of such households of elderly, either single or as couples, and found them to be very pauperised (Hampson: 1984). Although forming only five per cent and two per cent of sampled households, in the study of three rural communities such elderly seem to experience great poverty. They have little recourse to informal social support because they had had no children, or their children died, lived in another country or, for other reasons, provided no support through remittances.

Another sub-group of pauperised elderly, partly included in the above categories, are widows. Within Zimbabwe their situation has been well analysed by Folta and Deck (1987:330) who write that "widows were degraded by the practice (of goods going to the husband's family) ... and left destitute, often with only the clothes on their backs or, if lucky, with a blanket as well ... The welfare of the widow and children was ignored or regarded as unimportant". Other studies have confirmed this bleak picture of the poverty of elderly widows in Zimbabwe.

A common method for alleviating or removing poverty among the elderly is through financial support from children and family members, but this is being reduced as remittance flows from urban areas decrease. On the macroeconomic

level the relationship between the rural and urban sectors of Zimbabwe, as well as between the formal and peasant sectors of the economy, seems to demonstrate that remittances from urban workers tend to exacerbate the degree of inequality among rural households, they also continue, to some extent, to be a form of social security subsidy for capitalist development.

Many urban workers used to provide remittances to rural 'homes' not only for short-term assistance but also to keep a presence in the home area which could be activated upon retirement. Because of low wages, remittances were small and unable to provide for the post-retirement needs of the rural elderly. In fact retired elderly workers usually went 'home' in order that they could depend on the urban remittances of the next-younger-generation of workers. Yet recent changes mean that there are now fewer cases of urban-rural remittances because of the contracted labour market, and because there is less motivation on the part of employed urban children to keep a presence in their rural setting. More and more of the urban population now see their future, even in old age, in terms of the urban environment, and a main motive for remittances is thus removed. "Under these circumstances the elderly, and particularly the elderly women, are likely to be at the greatest disadvantage" (Elliot, 1975:101). One striking feature of a survey of elderly households which did not receive remittances is the high percentage (31 per cent) having children in formal sector employment. Of the elderly who reported receiving remittances 'rarely' some 87 per cent had children in formal sector employment (Hampson, 1984:23). Even the continued flow of remittances does not guarantee relief from poverty, for household surveys demonstrate the huge variation in amounts. Jackson's (1988) survey showed over one third of households reporting receipt of remittance, with a mean of Z\$348 in a year, and only the top ten per cent of annual household incomes averaging \$1 000 per household.

This changing pattern of urban/rural financial flows means that Zimbabwean elderly in general, and women in particular, are increasingly disadvantaged because the incidence of remittances is decreasing. The wide range in the amounts of remittances that are actually made serves to widen rural inequality.

Another example of the process of pauperisation among elderly in general (and where rural elderly are likely to be affected to a considerable extent) is the change in the nature of the bridewealth system. Rwezaura (1989) has shown how the two sources of traditional old age security for elders, that of the elders' control of nubile women and easy access to younger mates, has declined in importance, and little has developed to substitute for this. In 1982 the passing of the Legal Age of Majority Act in Zimbabwe has had the effect of (1989:16):

"reducing, if not in some cases completely taking away, the elders' control of the juniors, especially marriageable women... Elders could no longer count on their juniors to provide for them during old age".

But this loss of control and security has produced a counter-reaction, that of neo-traditionalism, together with considerable increases in the level of bridewealth payments, and financial and lump sum payments rather than cattle or other consumer goods. This change, argues Rwezaura, is due to elders' fears that sons-in-law could not be relied upon to make voluntary contributions when the occasion demanded it. As I mentioned earlier, however, the impact of this Act is less strong in rural areas, where elderly still have some control over marriage arrangements.

### *Cultural and social exclusion*

Elderly Zimbabweans today have experienced profound cultural and social changes. In their lifetime there have been dramatic increases in population, a decrease in plural marriage or polygyny, the erosion of traditional value systems and traditional culture in general, and the creation of a post-colonial state. Many of these changes are part of what can be called the ambivalence of growth, and have been noted earlier in this paper. With modernisation the cultural role and status of the elderly has, in many ways, been devalued. The elderly, for example, have been marginalised in the formal educational system, with its academic qualifications. To be unable to speak English is to be regarded as uneducated. Very little, if any place in the curriculum is given to the possible role of elderly in transmitting cultural values. In a country where half the population is under 15 years old, the cultural dominance of 'youth', at least in name, makes for processes of exclusion of the elderly.

The emerging dominance of the nuclear family throughout Africa, and the concomitant lessening of extended family ties, is commonly held dogma, but there is little hard evidence to show the degree of change, especially as it affects the elderly. One recent study, to assess the extent of change within family, kin and neighbourhood support for the elderly, attempted to measure social support resources at the state, community, network and family levels and used a number of data gathering methods, including a sample survey of 300 elderly (Hampson, 1988)<sup>3</sup>. In respect of the extended family, which is the foundation of almost all of the social support available to elderly, it is the extended family itself which also benefits from support *provided by the elderly*. In other words there is a reciprocity of support, reinforced by social and religious factors. Yet evidence seems to show that the functions of the extended family are altering, to the detriment of support for elderly, and to a lesser extent to the detriment of support by elderly.

This lessening of support is to be seen particularly in relation to one crucial variable of social support at family level, the involvement of children. It was noticeable that a considerable number of elderly respondents who had had formal sector employment reported providing care and financial assistance to their brother's as well as their own children. This assistance was not always reciprocated. Various elderly remarked that although they invested in the education of their brother's children, these children often let the ties lapse if they are in town and their parents die. One respondent, James J, recalled how he had once paid a visit to his

brother's children: "they could not even pay for my bus fare back here, and I had to borrow from my former work mates. I will never return to them again." Misheck N, a 65 year old pensioner who worked 20 years with a bank, recalled that although his sibling's children were educated at his expense "because my young brothers could not afford to pay for their children's school fees, now I get nothing from them in return... I regret having spent my money on educating people who would turn a deaf ear to my problems in the future."

In traditional society the *muroora* (daughter-in-law) was a further significant provider of care and support even though a certain reserve and ritual proscription form part of the relationship. In discussions with the survey elderly a common theme was the changing role of the *muroora*, who nowadays is often unwilling to take on a caring and supportive role. In rural situations where there are a few menfolk or children (because of migration to town for jobs or education, or because the local schools are in session), the elderly complain that daughters-in-law are not interested in helping to look after cattle. The resentments in such relationships are not one way. During research the author observed one woman in a distressed state at the local hospital, having been beaten by her husband. She reported the reason for this beating was that her elderly mother-in-law had complained to her son about the *muroora's* obstinacy. The daughter-in-law had refused to stop breast-feeding her child despite the instructions of the elderly mother-in-law. Often the conflicts represent a clash of different cultural standards. One daughter-in-law was accused by the mother-in-law of wanting to be a prostitute because of taking contraceptives. Of course the *muroora* is seen in some respects as a stranger who comes into another family. She has to refer to all women of her husband's lineage as *vamwene* or owners. One woman, D, still keeps up contact with her home area at the age of 67: "I'm a foreigner here. Don't you know I can be divorced and find myself with nowhere to go if I don't communicate with my people and ancestors?"

Many elderly thus perceive that the *muroora* is less likely to care for her husband's parents. Although kinship through the male line determines inheritance and economic patterns in households, nevertheless the relationship through the mother's lineage is very important. One's mother's brother, *sekuru*, has become a term of respect and reverence for any elderly male, and *muzukuru*, sister's son, the corresponding relationship of the younger person. Between *sekuru* and *muzukuru* exists a particular close relationship which is also a joking relationship. One can see in the household survey that for receiving daily help within the house *muzukuru* is the model relationship, and for recipients of emotional support from the elderly their *muzukuru* is someone very likely to be given such help.

The role of the eldest son as the main provider of economic support for the elderly seems to have been attenuated. Of course many elderly reported that their sons are important providers of all kinds of support. For example, B, moved to live with her eldest son who had built himself a home in the area. She had lost all contact with her home area some 100 km away, and her other sons had gone to work in

South Africa, so she relied on her eldest son quite extensively. At the other extreme, a 67 year old man, J, said "to have them or not to have them makes no difference; so why should I bother myself about them?" (Hampson, 1988). In general, for elderly Zimbabweans at the present time, the greater the number of living children the more likely it is that elderly Shona believe they have access to emotional, emergency, and material support and to support for activities of daily living. This conclusion is not unique to Zimbabwe. For example, in a study of rural households in Botswana, Chervishovsky *et al* (1985:190) conclude that "there is a strong positive correlation (between the three variables of number of living children, household income, and transfer income)... indicating the likelihood that the welfare of the elderly is closely related to the number of children living".

To some extent the daughter can be a source of support when she is about to be married, for the husband-to-be has to offer great respect to his in-laws, and indeed the whole family of the wife. The Shona proverb *mukwasha mukuyu haaperi kudyiwa* (a son-in-law is like a fig-tree, one never stops eating from it, ie a source of money or gifts) illustrates popular thinking about the relationship involved. Indeed the son-in-law may be in debt to his in-laws in his payment of lobola or bridewealth throughout his life.

The practice of grandchildren going to live with grandparents for extended periods of time seems to be on the wane. Previously such children would have been responsible for help in daily chores, fetching water and firewood, cooking, herding cattle, cleaning the house and washing clothes. The research survey mentioned earlier showed that granddaughters were present to cook food in 13 per cent of cases. Nowadays the practice has diminished because of the universal access to education - "even during holidays," complained L, "they are kept home in town by their parents so that they can do more studies" (Hampson, 1988).

### *Low planning priority*

In countries with strong resource bases and high levels of economic activity, the threat of modernisation is that elders, though taken care of, will become dependent and may also lose the respect and dignity that stems from making valued contributions to the community and family (Giele, 1982:56). In developing countries like Zimbabwe the elderly are excluded in both of these ways. They are made to be dependent, and are often very poor and lack the most fundamental necessities, as well as losing their ability to reciprocate contributions to care and well-being. This seems to have consequences at a national level, because the elderly can be seen in terms of passive recipients and a drain on valuable resources, they have a low planning priority. A survey of elderly undertaken in one part of Zimbabwe revealed that not only was the general public assistance programme unknown and misused, but the more well-published and active drought relief

programme was structured in such a way as to marginalise the elderly. They were not involved in planning the practical details, and were either omitted or came too late for receiving drought relief food (Hampson and Kaseke, 1988). Even in welfare programmes that are universalist in intent, like health, both preventive and curative interventions for the elderly are sometimes in practice not accessible to them. As Treas and Logue (1986:650) argue, the assumption that the aged are most appropriately a low priority in development is implicit in many national development policies. "This assumption reflects the assessment that there are other, more likely, contributions to development and other, more pressing, needs. A corollary holds that the needs of the aged will be served, albeit indirectly, by broad sectoral development programmes. They are assumed to share in the societal benefits of public health efforts, rural development programme, mass education, and the like". The evidence for Zimbabwe is that the elderly do not have equal access to state and regional programmes. For example, although Zimbabwean statistics on literacy show respectable levels on an intra-Africa comparison, the figures for illiteracy among the sampled elderly (some 64 per cent rated themselves illiterate in a survey by the author, and 83 per cent attended less than three years schooling [Hampson, 1984]) are poor compared to other African countries.

It should be noted, however, that at a local level the processes of marginalisation are less pronounced than they are at national level, at least with respect to cultural and social exclusion in rural areas. Within Zimbabwe there are a number of indigenous, local types of social support and social security potentially available to the elderly. Although losing popularity there are sometimes traditional forms of economic exchange and support based on work teams:

1. *Zunde* is the work provided for a chief or headman in his fields. There are two motives for such work: one is homage, the other is that in exchange for work in his fields the subjects have a right to call upon some of the harvest in times of drought.
2. *Nhimbe* is a work party centred on beer drinking and tends to be restricted to members of the same village. This is because the work is done on a rotational basis, during times of high labour demand (ie ploughing, weeding and harvesting). The hosts are the ones expected to provide beer.
3. *Jangano* is a mutual and reciprocal work party, with a smaller and more closed membership than *nhimbe*, where work provided is for the benefit of the whole group and where each member in turn is given access to the group's labour power. The host's obligation only extends to providing food.
4. *Jakwara* is the least formal system of access to labour whereby the hosts brew beer and offer an open invitation to assist in harvesting. Here there



is no obligation to reciprocate, and anyone, even passers-by, can be involved.

More important, ritualised meetings at funerals, marriages, and services before the rains are significant, in the sense of support, for the elderly, for it is then that neighbours demonstrate involvement either by cash contributions or by donating work time, and it is the elderly farmers who benefit. Studies have also reported that during times of drought in Zimbabwe local villages make maize collections so as to offer particularly destitute elderly a few buckets of maize for food. Neighbours in one rural agricultural community were perceived as helpful, half of them give and receive help 'often' or always and another quarter of the elderly reported this reciprocal help 'sometimes' (Hampson, 1988; 1989). Only 18 per cent of the sample reported no such involvement with neighbours. For those elderly without nearby children or other easily accessible forms of support, neighbours even in times of drought were a source of food. One elderly person described how in a very stressful period during the drought she would go off to visit neighbours before meals, and deliberately stay on and literally embarrass them into offering her a meal.

## Conclusion

In this paper it has been argued that, for the most part, the status and processes experienced by the elderly in Zimbabwe are best described by the concept of marginalisation. This paper demonstrates that in at least three important directions - in pauperisation, in social and cultural exclusion, and in low planning priority - the elderly experience a status and a process of increasing marginality. However, rural elderly are less affected by the forces of social and cultural exclusion, but more affected by pauperisation.

Some analysts present a picture of the successful peasant farmer in Zimbabwe, in fact the success story of Africa, and yet there is evidence of extreme destitution among some elderly farmers. Some studies (eg, Jackson *et al*, 1988) show the household gradually accumulating wealth over a lifetime, so that the age of the household head is closely related to cattle or livestock ownership, and yet some types of households of elderly do not follow this pattern, especially those households in which the elderly reside but are not household heads.

This analysis highlights factors that seem to sustain and reinforce the process of marginalisation. Earlier in the paper 'tribal trust lands' were identified as functioning to provide a cheap labour pool, and also to serve as a type of welfare system in times of illness and retirement for those in formal sector employment. In the time before Independence there was no attempt to make these areas self-

sustaining or to provide meaningful support to agricultural activities, sometimes there was even positive discouragement when peasant agriculture seemed to pose a threat to white commercial farming. For the relatively small group of elderly in the formal sector this meant that retirement was only possible by relying on the support of the next generation. Only recently has the Zimbabwe government given thought to the introduction of a national pension scheme, although limited to those in the wage earning sector. The welfare model in practice is strongly residual, and the small public assistance programme is means tested and almost unknown to most rural people. Such a minimalist approach means that there is no meaningful national minimum level of support, and no social security 'safety net'. Rather, the elderly, when becoming destitute, have to resort to social networks of neighbours, peers, siblings, and any significant others there might be to provide social support. The evidence so far available seems to suggest that this support is not only unsatisfactory in the face of individualist ethics and growing rural as well as urban inequality, but that many poor elderly live in conditions of such squalor and deprivation as to be completely unacceptable in any society, let alone one premised on traditional values that accord dignity and respect to the elderly.

Although not discussed in this paper, gender differentiation could be an important variable in understanding a significant part of the marginalisation of Zimbabwean elderly and is a thesis on which more work should be undertaken. It was found in one study undertaken by the author (Hampson, 1984) that elderly women, especially widows, are more likely than elderly men to live alone, more likely not to have livestock, more likely not to be in contact with children and close members of the family, and more vulnerable financially, socially and culturally. Although the forces of social differentiation are powerful, and in rural Zimbabwe much more so than the general assumption about undifferentiated peasantry would suggest, nevertheless it seems that gender differentiation, particularly because of social and cultural factors determining inheritance, is a very significant cause of elderly marginalisation.

#### FOOTNOTES:

1. Only the Tonga, a minority group in the North-west of Zimbabwe, are matrilineal.
2. The peculiarities of colonial and post-colonial economies mean that the statement is true even with respect to elderly who did enter formal employment, for very few had pension benefits, retirement systems or even looked upon urban employment as a direct way of preparing for old age.
3. The results of the Zimbabwean study form part of a seven-nation cross-national study of social support systems in transition sponsored by the UN University, under the direction of Dr A Hashimoto. Results are presently being analysed.

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