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Farming models and professional identities

Retired but responsible: Social position and constraints of the "old" generation on family farms. A Swiss case study

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Abstract: *Farm transfer is a critical moment for family farming. Farms are often handed over in a continuous process, which includes inheritance, succession and retirement. On Swiss family farms, it is not retirement but the handing over of the farm that has a major impact on the elder generation's life. This study aims to analyse the shift in responsibilities of the elder generation and how workload and responsibilities adapt to the social and physical situation of the elder generation. Semi-structured interviews were conducted with six farming couples, one male farmer, one female farmer, and one widowed farmer's wife in the Swiss cantons of Bern and Fribourg. All but one family still lives on the farm, all interviewees still work on the farm and assume responsibility in many ways. This paper shows that responsibilities for farm management and legal issues are mostly handed over to the younger generation, but not work. Responsibility in terms of work, emotions and contributions assumed on the farm by the elder generation can be clustered along five dimensions: a) financial responsibility, b) responsibility for "traditions", c) forced responsibility, d) loss of responsibility, and e) self-responsibility. Assuming responsibility is perceived both as a burden – when farmers face too hard physical work or are anxious about the viability of the farm – but also as an asset allowing the elder generation to stay on the farm and have a fulfilled life with a daily structure and involvement in farming family life. We describe general underlying shifts when it comes to changes in responsibilities: an initial shift from urgent tasks to support in on-going tasks; a second shift from "big farming" with cattle, arable land and a big home to "small farming" with chicken, vegetable garden and a small home; a third shift from public representation to a stand-by position in the background; and finally, a shift from caring for the farm to caring for oneself, especially in terms of health and recreation. Finally, we raise the question of the drivers for continuous involvement: Is it solidarity? Altruism or egoism?*

Keywords: *farm succession in Switzerland, retirement, responsibility, social role of elder farmers*

Introduction

In Switzerland, as is common around the globe, the majority of farms are run by families. Generally, this includes the close co-working of different generations and of persons of different gender on the farm, before and after farm transfer. Farm operators in Switzerland usually transfer their farm when reaching state pension age, which is currently set at 65 years, because reaching pension age curtails eligibility for direct payments. These payments are a key instrument of Swiss agricultural policy and vital for most of the over 50,000 Swiss farms. Few former farm operators move away from the farm after having handed over or retired. This is reflected in the the housing on Swiss farms: traditionally the farm includes both a main farmhouse and a separate small house – called '*Stöckli*' – or a flat on the upper floor of the main farmhouse, foreseen for the "elder" generation. Hence, on family farms several generations live physically close together and sometimes even today share their daily lives in a large multigenerational household. Moreover, in contrast to retirees in other economic sectors, they usually do not stop working on the farm (*e.g.* Contzen *et al.,* 2017; Lobley *et al.,* 2010; Rossier and Felber, 2007). This situation differs from other countries, such as Ireland, Australia or the USA, where on one hand no such deadline exists and despite early-retirement schemes, many farmers continue working after reaching 65 (see O'Neill *et al.,* 2010; Kirkpatrick, 2013; Conway *et al.,* 2016), and on the other hand, where farm transfer often implies that the elder generation moves away from the farm (Barclay *et al.,* 2012) and thus stops working on the farm. Hence, the general concept of retirement, which implies the transition to retirement as an important step for most people in post-industrialised countries, marking the end of working life and

the beginning of the 'ageing' life-stage (Backes and Clemens, 2008), does not fit the context of agriculture in Switzerland.
The academic literature shows that farm transfer includes a shift of goods and responsibilities from one generation to another (*e.g.* Gasson and Errington, 1993). While the shift of goods is generally easily accomplished, the shift in responsibilities presents a major challenge (Contzen *et al.,* 2020).
Assuming that managerial control and responsibility are handed over, what kind of responsibility is still in the hands of the elder generation *after* farm transfer or which new areas of responsibility do the elder generation have? There is little academic literature on these questions. The present paper therefore aims to analyse the shift in responsibilities of the elder generation and the way in which workload and responsibilities adapt to the social and physical situation of the elder generation.

"Responsibility" in the context of farm transfer

While the study of farm transfer in post-industrialised countries has a long tradition (*e.g.* Fennell, 1981; Potter and Lobley, 1992; Jaunecker *et al.,* 2011; Lobley *et al.,* 2012; Burton and Fischer, 2015; Cavicchioli *et al.,* 2018), few studies have focused on farmers' retirement and ageing (*e.g.* Commins, 1973; Riley, 2011; Garnham and Bryant, 2014; Conway *et al.,* 2016; Downey *et al.,* 2017).
The intergenerational transfer of the business is fundamental in family farming (Gasson and Errington, 1993) and in family firms in general (*e.g.* Handler, 1994; Miller *et al.,* 2003). This transfer consists of three different but related processes: 'inheritance', succession and retirement. While inheritance signifies the legal transfer of the ownership of the land, buildings, machinery etc., succession is the transfer of managerial control and financial and legal responsibility for the farm (Gasson and Errington,1993). Retirement, finally, means the withdrawal of the current farm operator from active managerial control and in some cases also from day-to-day farm activities (Lobley *et al.,* 2010).
A large body of literature exists on farmers' reluctance to (fully) transfer the farm and retire 'early', *i.e.* at an 'official' retirement age, because of "sentimental bonds with the land" (Bika, 2007: 256), their livestock (Riley, 2011) and their home (Kirkpatrick, 2013). In addition to these intrinsic factors linked to farming or the "psychic income" of farming (Gasson and Errington, 1993: 228), the maintenance of farmers' identity often inhibits timely farm transfer (*e.g.* Conway *et al.,* 2016; Riley, 2016). Finally, handing over the farm to the next generation implies a loss of social status, professional recognition and self-esteem (see Conway *et al.,* 2017) or to use Bourdieu's terminology, symbolic capital (see Conway *et al.,* 2016). These consequences of farm transfer leads to the postponement of farm transfer until a very old age (*e.g.* in Ireland, see Bika (2007) or the US, see Carolan (2018)). Despite having transferred ownership (*i.e.* 'inheritance'), only minimal managerial control and decision-making responsibilities are transferred to the younger generation (*e.g.* Conway *et al.,* 2017) or retired farmers contribute to the family farm, as long as their health allows (*e.g.* Contzen *et al.,* 2017).
The farm transfer literature agrees on the understanding that succession is not a single event but a process (*e.g.* Bertolozzi-Caredio *et al.,* 2020). Different authors described stages in the succession process along the axes of delegation of responsibility and managerial control: Hutson (1987) identifies four stages in the succession process (cited in Barclay *et al.,* 2007: 5-6) whereas Gasson and Errington (1993) describe four 'ideal types' in the succession process, to which Errington and Lobley (2002) added two more types. Errington (1998) analysed the 'ladder of responsibility' which the successor must climb until receiving full managerial control and responsibility. Based on his international comparative survey, Errington (1998) shows that the first decisions delegated relate to technical aspects, such as the type

of fertilizer to be used, or the day-to-day planning of work. Then the areas of decision-making gradually become more central to the farm business. The last decisions delegated concern the financial area.

Methods and data

Methods of data collection and analysis

The paper is based on a study on retirement in Swiss agriculture, carried out between 2014 and 2016, which aimed to assess the situation of retired farmers after reaching pension age and / or after having handed over the farm. Qualitative fieldwork was carried out in the Swiss cantons of Bern and Fribourg. Semi-structured topic-guided interviews were conducted with male and female farm owners who had already transferred or were about to transfer their farm to a successor.

Nine interviews were conducted at the interviewees' homes with a total of eight women and seven men. The interview guide followed the model of critical life events (Filipp and Aymanns 2010) and covered the following topics: daily life after retirement or farm transfer, roles and responsibilities, expectations before retirement and their fulfilment after retirement, influence on relationships and social network, and identity and meaning of retirement. The interviews lasted between 45 minutes and two hours and were recorded and fully transcribed in German1.

For this paper, the transcripts were analysed regarding the various notions of responsibility assumed by the elder generation on the farm in order to summarise the content within inductive categories emerging from the text and deductive categories we derived from the literature. This step was carried out through successive summarizing, creating categories and subcategories, paraphrasing and reformulation of categories. To do so, qualitative content analysis after Mayring (2000) was applied. After a first trial coding, the coding frame was slightly adapted for definitive coding. The coding was done with MAXQDA. The content of the different codes was summarized, and the categories clustered under five main topics with their subtopics (see Figure 2).

Sampling method and sample drawn

Sample selection followed the method of 'selecting sampling' proposed by Schatzmann and Strauss (1973), aiming to select contrasting cases based on predefined criteria. The sample consisted of male and female farmer between the ages of 63 and 70, see table 1. All but one female farmer had handed over their farm, six before and two at reaching pension age. Hence, at the time of the interview, not all had reached pension age and thus some were working as employees on their son's or daughter's farm. The interviews were conducted with six farming couples, one male farmer, one female farmer, and one widowed farmer's wife. All interviewees were still working on the farm to help their successor, which in five cases is a son and in three a daughter. In one case, the farmland is leased to a person from outside the family, nonetheless, the retired farming couple is helping the tenant. In only one case has the couple moved away from the farm.

One farm is a dairy farm, one farm produces crops and vegetable and seven farms are typical mixed farms producing milk, pasture, potatoes and eventually other agricultural products. All the farms are mechanized to a certain degree, but none is big enough to hire personnel; all tasks are shared between the people living on the farm, with specific additional support from family members, neighbours or specialists hired on a daily basis with their own technical equipment (*e.g.* for harvesting).

[1] Quotations used in the text were translated by the authors from German to English.

Inter-view no.	Interview with	Age women	Age man	Farm transfer	Transferred to	Location of their home
1	Couple	66	73*	8 years ago	Son	Separate flat
2	Male Farmer	61	63	2 years ago	Son	Separate flat
3	Couple	64	66	3 years ago	Daughter	Separate flat, but one shared household
4	Couple	63	68	6 years ago	Daughter	Neighbouring village
5	Couple	63	67	3 years ago	Son	Separate building
6	Couple	62	70*	6 years ago[1]	Tenant	Farmhouse
7	Female Farmer	63*	73	Next year	Daughter	Separate building
8	Farmer's wife	67	†	6 years ago	Son	Separate building
9	Couple	64	65	1 year ago	Son	Separate building
* farm transfer in year of retirement; [1]tenancy						

Table 1. Interviewees' details.

Results

The interviews show that farmers perceive retirement mostly as a continuation of what came before, rather than the end of working life as suggested by gerontological literature (Backes and Clemens 2008). The moment of handing over the farm, in fact, marks the end of a stage in life and is perceived as a change of the role of the elder farmers. However, the workload and, as suggested by the academic literature, large parts of the responsibilities do not change immediately. This is very much due to the primacy of farm continuity (to maintain the heritage) and a strong work ethic or the farmer's identity. Work and workload are associated with 'being a farmer' and 'belonging to the farm' (Contzen *et al.*, 2017).

"The farm is handed over, labour not…"

Many interviewed farmers state that having handed over the farm also implied handing over the responsibility for daily decision-making, strategic planning, finances and administration of the farm. This is what they expected to happen after farm transfer, and it is perceived as a big relief by most of the elder farmers. However, some seemed astonished that the workload and part of the responsibilities had not (yet) diminished, and that even new responsibilities had emerged or became more important. Hence, it seems that the areas of responsibility changed in line with the tasks elder farmers assume; 'to work' in many cases means 'to assume responsibilities'. Figure 1 provides an overview of the tasks and accordingly the responsibilities that decrease, stay the same or increase in farmers' perception after farm transfer.

In general, all responsibilities up to the highest step on the ladder of responsibility (Errington 1998) decrease after farm transfer. The tasks and responsibilities linked to the maintenance of the farm that are rather flexible in terms of timing and scope increase, as well as presence on the farm allowing the elders to monitor the farm and to attend to visitors. In terms of responsibility towards the wider society, the elder generation is less active and assumes more responsibility for their own health as illness and frailty could slow down farm activities.

Finally, we can state that not only the type but also the quantity of work might change, at least in the longer run, resulting in more freedom and flexibility. Nevertheless, a working day is mostly fully packed with tasks, as being idle is perceived by the (former) farmer as weakness. Linked to this weakness is

the fear of becoming redundant or even a burden on the younger farm operators and the farm itself that has to be cared for (not elderly people).

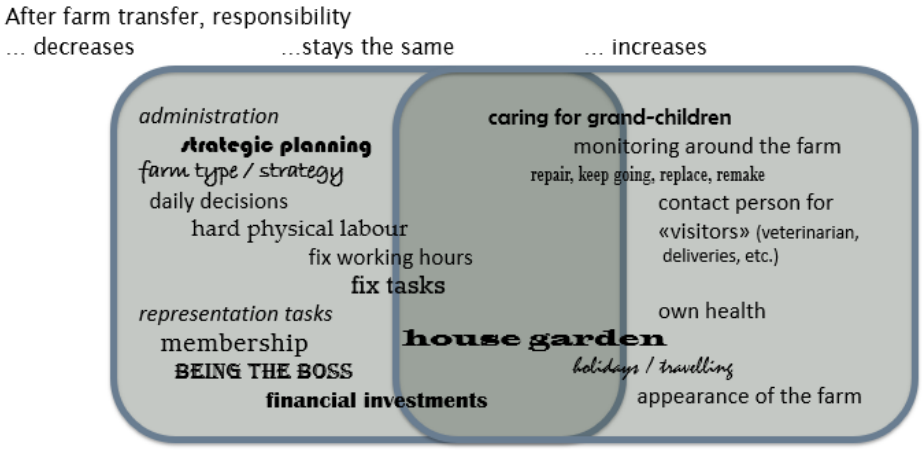

Figure 1. Farmers' perception of change of responsibilities assumed after handing over the farm.

Working on the farm and assuming responsibility as a burden and as an asset

Given that elder farmers associate work and workload with 'being a farmer' and 'belonging to the farm', work is not only perceived as a burden, but also as an asset. Work is a burden a) when it becomes physically too hard, or b) when the 'farming style' of the younger generation is not in line with the elder generation's values, c) when tasks are neglected, the appearance of the farm buildings and garden is not cared for as in 'their times' and d) when their experience and knowledge about running 'this specific farm' seems no longer to be important. In addition, they perceive their position and role on the farm as a burden when they feel the younger generation depends too much on their support, be this in terms of money or work and responsibilities. In the words of one female farmer: "We do as much as we can on the farm. Because, well, alone they would not manage to do everything, all alone".

But work and responsibilities are perceived by many of our interviewees also as an asset. On one hand it gives them a daily structure when living on the farm. The tasks they assume are a good way to prevent them from becoming bored and depressed, as one of the female farmers states: "So, what I feel, for my husband it that it's important to have something to do. Because, you know, you always hear about older people suffering from depression". Some interviewees link this aspect of mental health to the perception that farmers never retire, and thus do not have to reorient their life to a new discrete life-stage as other professionals have to at the age of retirement. Retired farmers always have 'something to do', because after having managed the farm for years, they see what has to be done on the farm.

One the other hand, elder farmers feel proud and satisfied when still able to support the farm, to contribute with work, presence and experience to the resilience of the farm during times of structural changes. "We wouldn't want it to be different… how can I put it? We have a certain feeling of satisfaction. It works out, and because we are part of it…", as one of the female farmers says in an interview.

In other words, what they have done during their time as farm operators continues after handing over the farm, because it is still the same farm, and this farm's continuity is the central aim of a long line of farm operators who managed the farm before they did, and will – hopefully – follow and run the farm over many more generations.

Responsibility beyond work

Work on the farm is the most obvious, but not the only way of assuming responsibility after handing over the farm. The many notions of responsibility mentioned in the interviews can be clustered under five main topics shown in Figure 2.

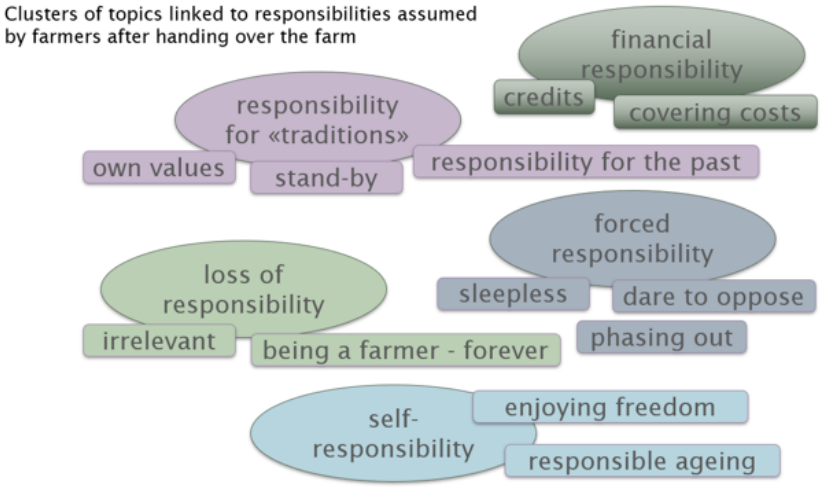

Figure 2. Overview of aspects linked to responsibilities assumed by farmers after handing over the farm, addressed by farmers.

The five aspects are not understood as discrete categories, but as different, interlinked life topics. In what follows, examples will illustrate the content of the clusters. Together they represent the manifold situations in which elder farmers perceive their dependence on and responsibility for the farm.

Financial responsibility

Farm transfer is expected to free the elder generation from the administrative and financial responsibility which is transferred to the successors. This is the case for direct farm management and responsibility. The successor covers the costs and gets the profit from farming. However, there are many costs that are not directly related to farm production or infrastructure maintenance. Most of the families interviewed have no or incomplete separation between the households of the younger and elder generation. When both generations live in the same house but separate flats, which applies in three of our cases, the kitchen is often shared, as cooking and eating is done together. Even when the older generation lives in a separate house on the farm (often called '*Stöckli*'), the elder generation regularly eats at least lunch at the main farmhouse within the younger generation. The interviewees state that they cover some expenses and do certain tasks for the whole extended family, thus relieving the household budget of the younger family, because they perceive the financial situation of the younger household as difficult. In addition, some elder farmers keep only the amount they need for own expenses from their old-age pension and hand over the remaining money to the common household budget. One female farmer explains: "We thought they really needed it [the extra money], but they never said so. But with the declining milk price and the whole farm, we sometimes wondered how they would pay for everything, the whole construction and the takeover of the farm. We then calculated how much money we need for us and we had the feeling that we can make do with less. We actually do it voluntarily and with pleasure".

Taking over the farm is expensive for the younger generation and they have to take out loans. Some parents provide their successors with loans and invest their savings in the farm. In doing so, they often become responsible for their stake in the farm, because they will need the money once they become frail and have to pay for external care should the younger generation not be able to care for them. A female farmer experiencing this situation describes it as follows: “We sometimes talk about money. And when I am in an old people's home, I will need the money. There are sometimes debates. You have to keep that in mind. But we haven't written anything down. Still, I can imagine going to an old people's home later. It turned out quite well with my mother. She was over 90 and could stay in the ‘*Stöckli*’ until four weeks before she died”.
According to our interviewees, the younger generation is well aware of the financial support they get from the elder generation. However, they very rarely address the issue.

Responsibility for ‘traditions’ and ‘ancient’ values

The older generation perceives themselves as belonging to a line of farmers who have managed the farm before, every generation continuing and improving what their predecessor had achieved. From their perspective, the success of the farm depended and depends on certain traditions, values and activities that are good and right. If these values and activities are no longer respected by the successors, they feel annoyed and suffer, fearing the decline of the farm. This suffering can be drastic, as one old male farmer complains: “I can see for myself that it's like that, that everything goes backwards, declines. When I came, everything was muddy, everything was neglected... Last week I went to the farm, and I cried for the first time since I left”.
Knowing from their own – sometimes difficult – experience when taking over the farm or joining the farm household when getting married, most elder farmers try to keep quiet and avoid commenting on the activities and values of the new farm operator. They are conscious that it is now beyond their responsibility. They take the position of a “hut keeper”, as one farmer calls it roguishly, meaning that he stays behind in stand-by mode. Since they are aware that values and the sense of responsibility are topics of tension between generations, most of the farmers say they decide wisely to remain silent. Still, some emphasize their values and traditions in educating their grandchildren: “You may even be able to teach them [the grandchildren] some little things, so perhaps a certain part of their character can still be formed”, a grandmother tells.

Imposed and forced responsibility

As developed above, responsibility is often perceived as a burden by elder farmers. They are to a certain extent forced to still assume responsibility. But some try to phase out, as one male farmer says: “But I said that until I'm 65 I’ll do what he tells me to do, but sometimes I don’t do it immediately. I just don't want to do the milking until I get 70, or muck out the barn”. Mostly, this is accepted by the younger generation, and they have to cope with the situation. But they might also be blinded by the fact that they know their parents as active and tireless workers and cannot see that their energy level becomes lower. One interviewee carried along a chair to show her son that she has to sit down from time to time. Another woman shows her gradual distancing from responsibility when she “does not jump up immediately” when her son calls her but finishes first her own activity.
Workload is not the only issue addressed. Interviewees indicate that the mental load can be severe, be this in sleepless nights or because parents feel responsible and guilty for having pushed their children to continue with the tradition and keep the farm, knowing they will have hard times.

Loss of responsibility

Losing responsibility for and control over the farm can be harmful for some farmers, as already addressed above. It seems to be especially hard when it comes to role and position, and lower visibility in society once they hand over the farm. One male farmer explains how ambiguous it feels to step back: “It is somehow a loss and somehow a gain. It is...yes, you are no longer the boss, and... I have to... I can't quite do it yet... I am happy, […] but I realize I am no longer a sought-after person. I was clearly the centre of the farm until this moment, and the next moment I am in second place, nobody is interested in me anymore. Before, everyone always came to me, to me, to me…”. Another male farmer is more positive and does not challenge his fundamental role as farmer when stating categorically: “As long as you are still something, you are still a farmer. That is what it is about.” Indeed, many interviewees see themselves as farmers, understood as a life-long role and position in society, but they are no longer ‘the’ farmer (of this specific farm), they have lost the role of the leader and the responsibility of the leader on the farm.

Self-responsibility

The interviewees have a considerably longer life expectancy compared to their parents and grandparents. When reaching pension age, they can ideally enjoy more freedom and leisure time, allowing them to explore personal interests and reorient themself in society. This so-called ‘third age’ is followed by a ‘fourth age’, marked by a loss of health and energy and growing frailty and dependence (Höpfinger 2009). When asked about their perception of ageing, the interviewees were clear about their fear of becoming frail and in need of care. This fear has two main aspects: on one hand that they will no longer be capable of contributing to the maintenance of the farm and supporting the farm operator, on the other hand they fear becoming a burden because they need to be cared for, which could be a challenge for the organisation of the farm, with off-farm work and tight schedules. The topic of frailty is delicate, as one interviewee states: “It is a difficult subject. When the moment comes, I will not comment too much about what will happen. We are simply dependent on the goodwill of the next generation, who could then say: ‘We have to put him into the home. Yes, that is difficult”. Staying healthy is perceived as a responsibility.

Another aspect could be called responsible ageing: The interviewees feel the need and responsibility to re-orient themselves in society. This could be by joining senior citizens programmes, organizing trips for the choir or former farmers, or trying out leisure time activities and hobbies for themselves. Some report that they enjoy travelling or just having a glass of wine with colleagues they used to meet regularly in the cheese dairy during their times as farm operators. Others struggle with the idea of leaving the farm for holidays.

Many of the farmers have not seen their parents re-orienting after retirement. Although lacking specific role models, our interviewees make the effort to assume self-responsibility for health, social integration and re-orientation as well as emotional and physical distancing from the farm. However, they seem to have difficulties perceiving themselves as retirees and they feel reluctant to orient themselves to role models of retirees outside agriculture.

Discussion and conclusions

The analysis of the dynamics of tasks and linked responsibilities assumed by elder farmers before and after farm transfer reveals a shift from ‘outside’ tasks, *i.e.* representing the farm in the public sphere and doing administrative tasks (first row in Figure 1) to ‘inside’ tasks, *i.e.* in the background and activities in

the farmyard (second row). This shift to the background or stepping back to the second row on the farm can be seen along different axes:

a) a shift from urgent tasks to support and replacement: As an example, the responsibility for timely milking and delivery of milk is mostly assumed by the active farm operators; former farm operators often have the freedom to start working later in the day and to do the early morning milking only when required;

b) a shift from 'big to small': While the younger generation is in charge of the main production sectors, the big animals, machines and the big house garden including the vegetable garden, the former farm operators are restricted to the reproductive tasks like repairing, maintenance, small ruminants and a small kitchen garden;

c) a shift from public representation to a stand-by position on the farm: In general, it can be observed that strategic decisions, daily decisions and the representation of the farm in the public space are mostly completely handed over to the younger farmers. In turn, elder farmers continue to assume responsibilities for repetitive tasks like gardening, fixing and repairing things or caring for children and animals. In some cases, due to the structural changes on Swiss family farms requiring income from off-farm activities, the younger generation may not always be on the farm. This results in the elder generation being regularly present, carrying out daily tasks and receiving feed or seed sellers, veterinarians etc. They somehow remain in stand-by mode.

d) a (often hesitant) shift from caring for the farm to caring for oneself, for example when reducing the workload for the sake of their own health or for recreation (travelling, holidays).

Many of these changed tasks and responsibilities are implicit and not negotiated: Elder farmers 'just' see the work, live and endure changing priorities, keep the farm running, provide care work (and be cared for later on?), etc. They do this because of their strong commitment to farm continuity and the hard-working ethic of famers. Their behaviour can on one hand be interpreted as solidarity with the younger family – intergenerational solidarity representing one element of families (Nave-Herz, 2006) – or as a strong altruistic attitude. On the other hand, at least to some extent, it can be interpreted as an egoistic strategy to fulfil their responsibility to their ancestors (farm continuity) and to keep their own identity as a farmer (farmers' ethic). These aspects in the context of concepts of solidarity, altruism and egoism should be further explored.

To conclude, according to our case study, handing over the farm and retirement are not the same. Responsibility is not fully handed over after farm transfer, but changes in quality and quantity. Reaching pension age does not change the situation except for the additional income from pension. Farmers' reluctance to hand over the farm, as mentioned in the specific literature, applies to a large extent to the situation after farm transfer: "sentimental bonds with the land" (Bika, 2007: 256), their livestock (Riley, 2011) and their home (Kirkpatrick, 2013) persist; farmers struggle with losing the resource "psychic income" of farming (Gasson and Errington, 1993: 228), their identity, social status and symbolic capital (Conway *et al.,* 2016). Contrary to Gasson and Erringtons' (1993) three dimensions, farm transfer in Switzerland involves inheritance and succession, but not retirement. As we were able to show in our case study in Switzerland, these bonds with the farm and farming result in aspects of responsibility which gain importance specifically after the farm handover.

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