



Employability and flexible retirement: Variations in academia in an age of austerity

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ABSTRACT

With both declining and ageing populations, countries are addressing the threats to their competitiveness by attracting more highly educated workers and by investing in human capital, especially through policies to increase the rates of participation by young people in tertiary education. As the population is still ageing, there are concerns over the affordability of state support for the elderly, their roles in society and the economy. Active and flexible lifestyles extend healthy life expectancy, so extending the length of the working life is increasingly seen as a way to ease the transition to an economy where an ageing population is affordable.

Senior academic staff, exemplars of such post-industrial flexibility, have long been accommodated beyond the statutory retirement age. Their benign conditions of work; high private and social returns to experience and knowledge; and their high levels of those skills, labour power and other capacities which do not degenerate with age, combine to prolong the length of their effective working lives. Against this, as in other sectors, redundancies, voluntary severance and other schemes to reduce staffing have encouraged early retirement. Increased demand for higher education has driven changes in the lecturing labour mix, with increasing use of a peripheral workforce of both early career and retiring staff. This has seen semi-retirement within higher education evolving to stretch the period over which withdrawal takes place.

In this context, the exploratory work reported here considers the initial responses by employers and trades unions in Scottish Higher Education to the abolition of the default retirement age and the introduction of 'The Employment Equality (Repeal of Retirement Age Provisions) Regulations 2011'.

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1. Introduction

Scotland is typical of the developed world in taking actions to address the challenges generated by an ageing population. Such challenges include the affordability of state support for the elderly, and their roles in society and the economy. Medical and social research from across the developed world suggests that active ageing¹ and maintaining active and flexible lifestyles extends healthy life expectancy (Kahila and Rinne-Koski, 2006; Droogleever Fortuijn et al., 2006; OECD, 2006; Green, 2009). Extending the length of the working life is therefore part of the panoply of measures being proposed and introduced to ease the transition to an economy and society where an ageing population is affordable (Ilmarinen, 2006; Pensions Commission, 2006; Pension Regulator, 2011).

As exemplars of such post-industrial flexibility, senior academic staff have long tended to be accommodated in both formal and informal positions post-statutory retirement age. Their benign

conditions of work; high private and social returns to experience and knowledge; and their high levels of those skills, labour power and other capacities which do not degenerate with age, combine to prolong the length of their effective working lives: whether in paid, casual or voluntary posts (Ilmarinen, 2006, p. 374). Academic labour markets represent a profession where traditionally age and experience have been valued, and there is a tradition of being engaged with the world of work (not necessarily paid) beyond state pension age; this is similar to most, although not all, other high status occupations.

Alongside this, however – and as is the case in other sectors – redundancies, voluntary severance and other schemes to reduce staff numbers have encouraged early retirement. In the context of previous external research assessments, eligibility criteria open to ageist practices (HEFCE et al., 2011), decreased the attractiveness of retaining or recruiting older academic workers, tending also to reduce these traditions of keeping them involved in the faculty. Countering this, confirmation of their eligibility for submission to the UK Research Excellence Framework (REF is the system to assess the quality of research in higher education institutions (HEIs) in the UK) and the increased demand for higher education (HE) with increasing student numbers and participation (UCAS, 2010) has driven periodic moves to promote changes in the lecturing labour

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¹ 'Active ageing is the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age' (WHO, 2002, p. 12).

mix, with increasing use of a peripheral workforce of both early career and retiring staff. This has seen semi-retirement within higher education evolving to stretch the period over which withdrawal takes place (Manfredi and Vickers, 2009).

Internationally, literature and practice has seen an evolution of these different trends within the HE sector, focusing in particular on the transitions and decisions around the traditional retirement age (Tizard and Owen, 2001; Tizard, 2004; Hugo, 2008; Moodie, 2010). The exploratory work reported here considers the experiences in Scotland and the rest of the UK HE sector, with reference to the position in other developed countries and with other sectors in the UK. It begins to identify how factors in the external regional labour market, for instance, may mould the opportunities and constraints on individuals and institutions to support mutually beneficial retirement plans. It is informed, therefore, by theories of how ageing productively is influenced by different factors in different geographies (Loretto et al., 2007). It is ground-breaking in terms of its consideration of the views of employers and worker representatives on the evolving context in HE with the abolition of the default retirement age and the introduction of 'The Employment Equality (Repeal of Retirement Age Provisions) Regulations 2011'.²

2. Theoretical frameworks for analysing older workers

Much of the research on older workers, and in particular on retention, retirement and severance, has been focused on the lack of choice and enforced changes, at least in the UK context (Loretto et al., 2007), though some of these issues are of much wider concern (OECD, 2006). Discussion of geography in this discourse has been limited (see Introduction to this special edition) and has tended to be focused on retirement communities, themselves concentrated in sunbelt regions of the US and Europe (Laws, 1994, 1995; McHugh, 2000, 2003, 2007; Hardill et al., 2005) and on volunteering (Hardill and Baines, 2009). However, this previous research has offered insights into how the meaning and experience of old age and ageing are neither fixed nor universal, but generated and exercised in the crucible of economic and social processes and structures located in particular spaces (Green, 2009; Pain et al., 2000). Following their identification and treatment of the spatial dimensions of ageing processes, the specific locational context of the workplace emerges as a case suitable for analysis (Lawton Smith, 2009; Green, 2009; OECD, 2006). And, like many other spaces of ageing, workplaces – where workers age and where they are subject to ageism – are undergoing legal, institutional and structural changes, suggesting they are essential spaces for consideration.

Embedded into the geographical literature on retirement and withdrawal from the labour market is an assumption, often implicit, that such a change in status occurs at a specific date, where full-time work stops and a precipitous change in employment and living follows. Policy and health prescriptions suggest this is not an ideal trajectory to optimise healthy life expectancy and activities (Droogleever Fortuijn et al., 2006; Ilmarinen, 2006; OECD, 2006; Green, 2009). Furthermore, there is an established literature which broadens such analyses to address the other factors impacting on the retirement decision and, in particular, interactions within the labour market between employers, state and private agencies, market institutions, and workers, etc. (Loretto et al., 2007; Ilmarinen, 2006). Occupational and sectoral variations in practice and power, especially, influence the propensity to leave early, retire at the customary age, or to prolong activity in the existing career (Ilmarinen, 1999, 2006).

Often the role of formal labour market theory in this environment has been limited to considering the implications of industrial restructuring, and developments in the demands for and redundancies of specific skills, rather than the loss of their respective talents, experiences and capabilities. The permanent redundancy of these attributes reflects the reality for many older workers in the marketplace, however, as evidenced by such commentators as Grattan of The Age and Employment Network (TAEN) who has noted the increasing time spent on welfare benefits by successive cohorts of older workers, low activity rates despite high employment rates for the over 50s, and the falling numbers undertaking training in their later years of work (Grattan, 2007, p. vi). He therefore argues for new perspectives that consider, among others, the quality of work as well as the quantity of work, the need for careers advice and training at all ages and stages, and the notion that change must be underpinned by substantial improvements in corporate culture (2007, p. vii). At a time of such fundamental disruptions to labour market processes, full consideration of how these interact with age and ageing processes, and with changes in the legal and other aspects of the institutional environment are warranted (see Wood et al. (2008) and Loretto et al. (2007), for reviews of the literature on age discrimination and older workers).

From the early 1970s onwards, there has been increasing interest in the notion of structures and segments in the labour market that separate workers into different institutional settings, all considered with a strong sense of place and geography. Early work revolved around the notion of a dual labour market (Doeringer and Piore, 1971), where the focus was on the secondary part in urban ghettos with its low pay, low returns to education and training, poor prospects of advance, and low levels of unionisation. This theory was debated and developed over the 1970s and 1980s (Edwards et al., 1975; Osterman, 1984; Braverman, 1974; Edwards, 1979; Bulow and Summers, 1986; Taubman and Wachter, 1986), with various forms of segmented labour market theories being proposed and examined in their different spatial environments. In light of the recessions of the early 1980s, there was greater interest in industrial organisation and market conditions and some argued that a new flexible economy was being generated (Piore and Sabel, 1984). Rather than being based on the mass production techniques of Taylorism and Fordism in 'dominated towns and cities' (see Lever, 1978, on discussion on communities where a single employer or sector dominates the local labour market), the new flexible firms and markets stressed tailored goods and services, dynamic and short customised production runs, etc. which impacted on their locations and local labour markets accordingly. Labour was also required to be flexible, with a core of highly skilled and dedicated staff complemented by a secondary or peripheral workforce with much poorer conditions, lower wages and security, with poor career prospects and so forth (Atkinson and Meager, 1986).

In each stage of these developing frameworks of the labour market, the focus of research was on the lower levels and peripheries of spatial labour markets, rather than on the primary segments or core. The latter would be expected to follow the neo-classical model of potentially mobile labour being rewarded for its human capital endowments. 'Core' (Atkinson, 1984), 'primary' (Doeringer and Piore, 1971), 'upper primary' (Edwards et al., 1975) or 'responsible autonomy' (Friedman, 1977) workers would align with the textbook descriptions of the supply side of the market. Academic workers in higher education within the UK and beyond would be representative of these sectors or segments of the labour market (Gregg and Wandsworth, 2001, 2002; Wilkinson, 1981). In most of these models, the parallel with spatial descriptors is obvious, with contrasts between the insiders and outsiders (Lindbeck and Snower, 2001) reflected in geographical terms of 'core' and 'peripheral and marginal' (Danson and de Souza, 2012). Returns to human capital endowments and investments, including

² <http://www.legislation.gov.uk/ukdsi/2011/9780111507735/contents>.

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