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# AGEING, ORGANISATIONS AND MANAGEMENT

## Constructive Discourses and Critical Perspectives

Ageing, Organisations and Management

Iiris Aaltio • Albert J. Mills
Jean Helms Mills
Editors

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# Section 1

## Introduction

# 1

# Introduction: Why to Study Ageing in Organisations?

Iiris Aaltio, Albert J. Mills, and Jean Helms Mills

Questions related to ageing are shared widely in and between organizations. People are living longer and working longer than they used to earlier (Levinson 1978). The percentage of people over 60 years of age is growing rapidly worldwide, with one report estimating that by mid-century the number of people over 60 will triple to nearly two billion people. This tendency is evident especially in Europe and North America, which countries face the retiring of the baby-boom generation (Aaltio et al. 2016). The growing phenomenon of ageing has had, and will have, a major impact on the economy and on social and work life (Davoudi et al. 2010). Age is widely used to judge workplace tenure and suitability for certain types of work. For example, there are age restrictions on pilots and surgeons in a number of countries (Bridges et al. 2014). Historically,

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a number of countries have had retirement ages in place but recent debates have led to the ending or extension of the age at which individuals are required to stop full-time work. For instance, in Canada, the retirement age was 65 years of age until recently when the practice was legally ended in most jurisdictions.

Issues of ageing, therefore, arguably require growing attention to be given to a range of organizational practices, including management and managerial action, work–community balance, changes to the human resource management function, and a range of individual and group situations and dynamics. Many organizations develop diversity management programs of which ageing is a part. However, even if societies emphasize the need for workers to stay in work life longer, often ageing employees are the main victims of downsizing or restructuring (Buyens et al. 2009). Nonetheless, in the context of specific labor shortages, it has been recognized that something must be done to stop older employees from leaving the workplace and to raise the employment level of ageing employees. This has been particularly the case in European countries (Walker 2005; Henkens et al. 2008; Parry and Tyson 2009). Overall, many practices related to ageing at work are arguably culture dependent (Hermalin 2001) and practices in different regions of the world vary, such as retirement age. In short, the focus has been on different kinds of management practice for the older workforce, including training, supervision, and human resource management that consider age in practice but also as a focus of research (Fineman 2014). For instance, the impact of age on such things as stereotypes of the ageing worker (Hedge et al. 2006; Brought et al. 2011), workplace efficiency, career development, retirement policies, experience (Kanfer and Ackerman 2004), and training and development needs (Ilmarinen 2006) are among the issues more often studied.

Ageing and age are fundamental phenomena of social life. Ageing, life stages, and mortality are part of the central mythology of all societies. Various religions, fairy tales, folk wisdom, and poetry contain images of ageing. While they may differ cross-culturally, the images of the old in any society have both positive and negative aspects (Wada 1995, 57). These stereotypes have their origins in the deep levels of a society's culture, but are also rooted and reinforced in organisational cultures, where practices, reward structures, and traditions are all implicitly based on deeply held and unexamined images of ageing held by their members—what Unger (2004) refers to as the formative context. Organisations usually reward people who have worked at the enterprise for a long time, which is one example of a practice that shows respect for ageing within the frame of the organization. The accumulation of knowledge, including tacit knowledge, is seen as being related to experience, and experience within enterprise is normally associated with ageing. But not all people will "age" in one organization; rather, their careers cross over many boundaries, during active work-life sessions. It is also a stereotype to think that aged people are not willing, or able, to move on in their careers (Aaltio et al. 2016), and therefore cannot meet the standards of today's work life.

In some cultures ageing is respected and thought to bring wisdom, in some it is devalued, and in others it is seen as a topic that is taboo. Based on the way that ageing is faced in society, its treatment within organisations also differs. For example, Asian cultures usually value ageing more than Western societies (Leung 2000). However, in Western organizational contexts, ambivalence concerning the value of ageing employees is common. On the one hand, it is recognized that "old age" may bring valuable expertise and wisdom, and what is referred to as crystallized intelligence (Kanfer and Ackerman 2004). On the other hand, stereotypes related to older employees include being viewed as less productive, less healthy, and less able to cope with change (Hedge et al. 2006; Brought et al. 2011). In either case, the association of age with innovation and change is problematic. Experience and wisdom, although perceived positively, can nonetheless suggest sedentary and established qualities, rather than an ability to respond in new and innovative ways. Although recent research has shown that the assumption of a general decline with age is simplistic and incorrect, stereotypical assumptions concerning an older worker's abilities and job performance continue to influence Western organizations' understandings of age (Brought et al. 2011). In any event, innovation is not normally viewed as a potential quality of older employees. Issues usually focus on compensating for a supposed loss of skills and abilities through such things as training and reevaluations of the types of work that ageing employees are expected to undertake (Ilmarinen 2001).

Featherstone and Wernick's (1995) exploration of issues of culture and their relationship to various cultural topics related to ageing has raised questions about gender and identity, the ageing body, issues concerning death, and so on. They also offer historical and comparative cross-cultural perspective on ageing. While the authors place no special emphasis on the perspective of organisational cultures, we learn that "bodies", the physical presence of individuals, who are ageing in work-life, are generally understood more within frames of culture than based on specific changes in performance or ability or skill, and so on. Thus, the outcomes of ageing, and treatment of ageing workers, in organizational life can be understood only in terms of the interpretations that the surrounding culture imputes to them.

Within studies of diversity, ageing has been recognized lately in many research publications (Helms Mills et al. 2010; Bendl et al. 2015), including special issues of the *International Journal of Work Innovation* in 2016 (Aaltio et al.), and *Organization Studies* in 2014 (Thomas et al.). This growing interest raises questions about a range of issues linked to the supposed dichotomy between the needs of organisations to retain organizational memory and tacit knowledge and experience, while balancing concerns about the supposed loss of skills of older workers.

What happens in respect to age in organisations has not often been subjected to critical research (Fineman 2014) in and between organizations, which is surprising given the implications for identity work (Bell and Nkomo 1992; Alvesson 1998; Creed and Scully 2000), the growing interest in diversity at work (Bendl et al. 2015), and the exponential development of interest in intersectionality (Collins and Bilge 2016; Hearn and Louvrier 2016), with its focus on composite identity points of gender, race, class, ethnicity, and age. Within organizations age can also have profound implications for a person's career, especially when it intersects with gender (Hearn 1995; Woodward 1995; Irni 2009) and other diversities (Bonsdorff et al. 2009; Aaltio et al. 2014). Throughout the various recent debates on ageing and work, there has also been little attention paid to the discursive nature of age and ageing, although this clearly differs across regions of the world, nor the implications, not simply for organizational managers but for the fundamental human aspects of being understood as aged or ageing.

In this book we have tried to reflect the diversity of issues raised above. The book covers various perspectives towards ageing in organizations, grounded in a range of social science theories and empirical investigations. We have gathered together various researchers who use multiple methods and methodologies throughout the book, all dealing with the topic of ageing. While commonly age is understood mainly as a chronological and universal category, in this book we present it critically and contextually. Throughout the chapters, we suggest that age has many contexts, including the psychological process of ageing in the mind as well as cultural, gendered, generational as well as career and human resource management contexts. This view, we suggest, provides insights into the challenges that face managerial, employee, and policy decision-making.

## The Decisions and Contours of the Book

### Section 2: Age in Discourse and Myth

The book begins with three chapters (Section 2) which, respectively, examine the role of mythology and discourse in relationship to age and ageing. We selected these chapters to begin with a disruption of the notion of age and of ageing as a universal, given, thing—moving it to a phenomenon that in large part owes something to cultural context and sensemaking.

In the first chapter, Shelley Price, Chris Hartt, Tony Yue, and Gretchen Pohlkamp focus on ageing among first nation peoples in Canada, specifically Inuit people. Through examination of selected Inuit narratives, Price and her colleagues demonstrate the existence of positions that are related to age in the Inuit culture. They go on to contend that in the Inuit culture the notion of age is contestable and liquid and that the value of age is like a cultural norm, which varfies from nation to nation, and from one ethnic group to another one. In their study Price et al. draw largely on actor–network theory, ANTi-History, and Critical Sensemaking. They study the discourse of age constructed by an actor-network and traditions in order to expose important discursive ideas, values and beliefs, that support the knowledges and value of ageing in an organizational context.

In the second chapter in the section, Cara-Lynn Scheuer and Albert J. Mills explore how age is explored discursively over time. Studying US business textbooks published between 1914 and 2015, Scheuer and Mills examine how the older and the younger worker has been discursively constructed within management textbooks. Drawing on Critical Discourse Analysis (CDA), the authors demonstrate how US business textbooks overwhelmingly privilege the male, able-bodied worker who is neither too young nor too old to be a 'productive' employee. Scheuer and Mills found that older and younger workers were situated as falling outside this ideal age range and were characterized by the textbook authors as being highly 'problematic' as a result. This somewhat surprising result revealed the discursive nature of age and its dependence on contextual influences that at times valued the young worker and at other times valued the older worker but which more often than not marginalized both.

In the third chapter Iiris Aaltio returns the debate to examination of mythology, archetypes, and societal collective unconsciousness to examine their relationship to gendered aspects of ageing. To that end, she undertakes analysis of Tolkien's story *The Lord of the Rings*. In particular Aaltio examines how mythology speaks unconsciously to issues of leadership, careers, and charisma. She argues that such storytelling often draws on heroism and charismatic figures that have profound implications for women and men of organizational life, affecting their views to develop sustainable careers and attain positions of leadership. Using a critical perspective, Aaltio views ageing as a Grand Narrative whose exposure through deconstruction allows us to understand the cultural roots of discriminatory notions of ageing and its relationship to gender.

## Section 3: Age as Career

The three chapters in this section focus on the impact of *the idea of* career on how ageing comes to be understood. Here we move from discussion of the mythical and discursive nature of ageing to examine how organizational practices—especially career decisions—contribute to and enact ageing.

In the first of the three chapters, Hanna Salminen and Monika von Bonsdorff focus on issues of retirement and career changes. They contend that the decision when to retire is one of the most central transitions during the late career stage of individuals. Combining a "career perspective" with "psychologically oriented retirement research," Salminen and von Bonsdorff study older employees' retirement intentions in the context of changing careers. Their findings indicate that new career models of mobility across organizational boundaries require high career capital; requirements that can be challenging for older employees, who may face negative age stereotypes and an unsupportive organizational environment, which can foster feelings of career plateau and early retirement intentions.

In the second chapter, Suzanne L. Cook and Victoria Rougette examine the impact of the social impact of ageing on the workforce and the use of "talent management." They argue that the unprecedented shift to an ageing population requires business and industry to examine the issue of talent management of older workers while considering their career development. This means taking care of such things as older worker recruitment and retention, succession planning, knowledge transfer and the skills gap.

Building on the previous two chapters, Pia Heilmann focuses on strategies for extending careers in ageing societies, arguing that career prolonging objectives should be recognised during a person's whole career and especially directed at middle-aged employees. Such methods of prolonging careers could include flexible work arrangements and opportunities for further education. Heilmann's study is based on the analysis of the stories of 48 middle-aged workers.

## Section 4: Age and Gender at the Intersections of Organizing and Managing

In Section 4, we return to the issue of gender and ageing introduced by Aaltio in the opening section. The four chapters in this section engage with the intersecting issues associated with age on the one hand and gender on the other—a continuance of the practices in organizations that are infused with gendered influences.

The section's opening chapter is by Leanne Cutcher and Kat Riach, who explore the intersections between ageing and masculinity in the hyper-masculinist culture of the UK financial sector. Through in-depth qualitative research undertaken in a UK hedge fund, Cutcher and Raich explore how gendered roles socially ascribed throughout the life course were utilized by the male traders to combat the stigma of ageing. In the process, they reveal how "the masculine norms of the trading floor extended into retirement. Their finding indicates that the construction of the 'ideal' traders as 'experienced men of action' narrowed the spaces for negotiation and retirement for both men and women.

In the following chapter, Elisabet Cedersund, Carin Holmquist, Gunilla Rapp, and Elisabeth Sundin study age, gender, and labor market activities. Their focus is on the standpoint of those enterprises that employ seniors as service provider, with the aim of the chapter to describe and analyze the enterprises that market themselves as employers of older individuals or seniors in Sweden. The key-concepts of age, gender, work, staffing agencies and entrepreneurship provide the point of departure for both the description and the analyses of the study. Cedersund et al. found that ageism is a common phenomenon in Sweden, with gender stereotyping dominating the way in which the enterprises present and market themselves. The chapter concludes with a discussion on how to counter the negative associations to old age can be transformed to more positive outcomes.

The third chapter in the section, by Kaisa Kauppinen and Mia Silfver-Kuhalampi, presents findings from a questionnaire survey and a series of qualitative interviews with Finnish working age participants, who provide (paid) care to their older family members. In particular the researchers wanted to know what kind of workplace practices were used to support caregivers' motivation and well-being at work. They were especially interested in the role of the managers and work colleagues in regard to other employees' eldercare responsibilities and arrangements, especially women's professional roles The findings reveal the multiple role that older employees undertake at later career stages, requiring several adjustments in their work duties and roles showing that flexible work arrangements and sensitive management policy really have significant impact on caregivers' stress, burden, and certainly aims to continue at work even if having this double role.

The fourth chapter in the section is by Marjut Jyrkinen, Charlotta Niemistö, and Jeff Hearn, who analyse the intersections of age, generation and gender, and questions on work/family relations, at both individual and organisational levels. In particular, linking with the previous chapter, they examine how women and men managers in different ages and generation groups perceive their own and their employees' care responsibilities, and work/family relations. The chapter examines how gendered age and aged gender affect organisations; how age, work-life and careers, and generations intersect; how different age groups/generations of managers and professionals in the pipeline for management positions perceive their career prospects in relation to questions around work/family; how the intersections of age and gender amongst professionals encounter care responsibilities for older people in working life; and the expectations of younger and older workers on the work itself.

## Section 5: Age at the Boundaries

In this section we turn the focus away from the dominant large-scale organizations and the central issues of retirement to examine relationships between age and entrepreneurship.

In the first chapter, Hannu Tervo and Mika Haapanen examine entrepreneurship as an option for many older individuals, either a career option or a form of partial retirement. "Self-employment," as they argue, brings the freedom to adjust working hours, which is an advantage for many older full-time workers in the West. In contrast, older individuals may also be pushed into self-employment in the absence of other alternatives. Drawing on an extensive longitudinal data set from Finland results indicate, that opportunity-driven older self-employed are more likely highly educated males, whereas the necessity-driven self-employed are often less educated females and individuals who live in rural areas.

In the second chapter of the section, Martin Klinthäll and Elisabeth Sundin follow on from Tervo and Haapanen, focusing on entrepreneurship as a way for an individual to go on working for as long and as much as she/he wants and avoid age-discrimination in organizations. However, they caution that entrepreneurship, or rather self-employment, can be seen as the last resort for older individuals on the market. They contend that older entrepreneurs are a very heterogeneous group with very different needs and challenges. These differences are illustrated in the study through a focus on two different sectors: technical consultants and those involved in art and literary work. Arguing that age and entrepreneurship are context-bound, Klinthäll and Sundin locate their study in Sweden in the first years of the twenty-first century, based among other things on registered data on the whole population of Sweden. They also report on a series of interviews with entrepreneurs, as well as with experts on entrepreneurship and on age and the labor-market.

## Section 6: Age in Transition

In the final section we turn to the issue of socio-economic and organizational change.

In the first of two chapters, Kristiina Niemi-Kaija focuses on the recent widespread reorganisation of the Finnish public service delivery system as a cause of challenges to and a potential for rethinking ageing at work. Arguing that less attention has been paid to the positive value of ageing, Niemi-Kaija sets out to answer how various assumptions of ageing are created and what kind of positive ideas about ageing and innovativeness can be found from [an] organizational aesthetics perspective. To that end, she conducted interviews with 17 professionals who work at the municipal home care services and sheltered accommodation designed for older people. The data was interpreted using deconstructive ideas. Niemi-Kaija then analyzed organizational member's constructions of innovations, elicited through stories of insecurity at the edge of confusion. Through this approach she was able to reveal moments, when employees were forced to abandon their familiar ways of performing. The process suggested that among other things aged employees' abilities to embrace the diversity and realize the benefits of different personalities and performance styles created a wider variety of solutions to problems.

The final chapter of the book is left to Catherine Earl and Phillip Taylor who take a critical stance on the concept of bridge employment, questioning its utility for researchers and policymakers as a lens through which to view the evolution of work-retirement transitions. Earl and Taylor contend that despite the growing and extensive literature on bridge employment that typically occurs "between the end of a career job and full employment", the area is under-theorised and lacking a long view that takes account of political economy and life course perspectives. They concluded that bridging the gap between work and retirement is of current concern as governments push out the ages at which people work and retire, with retirement, once considered the morale foundation of social welfare systems, being refashioned as a kind of unemployment.

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# Section 2

## Age in Discourse and Myth

# 2

# We the Inuit: Fluid Notions of Age and Non-corporeal Actants

Shelley T. Price, Christopher M. Hartt, Anthony R. Yue, and Gretchen G. Pohlkamp

## Introduction

"In traditional Aboriginal culture, the most important teachers are the Elders" (Kulchyski et al. 1999, xi). The value of age is a cultural norm, which varies from nation to nation, and ethnic group to ethnic group

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(Mehta et al. 1995; Larkey et al. 2001; Takagi and Silverstein 2006). We suggest that the notion of age is also fluidly experienced within organizational contexts, shifting the constructs of identity not only in relation to the value of self to other, but also within the self-relationship. In this chapter, we examine the value of the elderly as expressed in the narratives of several Inuit, in the account of Martin Martin, an Inuk Elder from Labrador, Canada.[1] His story is shared as part of an oral history collection published in a quarterly periodical entitled *Them Days* in Happy Valley–Goose Bay, Canada. The main purpose of *Them Days* is to "maintain an archive of Labrador-related material … hold events celebrating Labrador history and work in conjunction with local seniors' groups" (Chaulk 2014). Martin Martin's account entitled *We, The Inuit, Are Changing* (1974) provides us with insights regarding ageing and the value of ageing in the Inuit culture.

## Understanding the Elder

Prior to invoking theory, it is important to situate the role of ageing and the aged in Inuit society. In this way, we attempt to honor traditional knowledge and not simply superimpose Western theory upon an Indigenous context. To this end we provide several insights from Indigenous thinkers.

To begin our survey of traditional insights, we first need to understand that an Elder is not simply an individual who is elderly or aged, but is also rich in life experience: "[o]ld people in age and life experience are the Elders … I do not believe in an Elder who is fifty and has not lived a life yet" (McKay 1999, 298).

This discussion of Elder can be analogous to the Management and Organizational Studies (MOS) elder who may be viewed by the young worker as old, obsolete, and in the way; worn out and useless; or as a source of exemplar and information. Conceptually elder/Elder is a moving target, generally older than the perceiver but possibly more tenured in the organization or society. Elders are situated in continuum and process, which is related to age but not exclusively bound by it: "[f]or me to be a role model, I have to tell my life story, for them to understand me. We also have to look at Elders as role models when they share with other people the things they have learned, and enjoyed. That I feel is very important, because without the role models of Elders, how can our young people survive?" (McKay 1999, 298).

Role models are important, and yet a sense of humbleness, not of hubris, is critical to understanding the role of the Elder. Carpenter explains how this humility comes from understanding the Elder's role as juxtaposed to that of the Creator: "As an Elder I have met many people and I tell them not to look up to me, I am a human being. Respect the Creator and look up to the Creator. That's how an Elder sees it. You will never hear an Elder say, 'Me, me, come talk to me.' An Elder recognizes humility and they must be humble themselves" (Carpenter 1999, 233).

Carpenter also identifies that the Elders' knowledges are not acquired exclusively in a linear way, and this does not diminish the importance of their insights: "We would go to see an old man or old woman and sit at the door of their tent. We had respect for them … The Elder would say, 'You will have a long life.' Now where did he get this? I would understand and take the person's words as being right and if I misunderstood that Elder's words, I would not be able to live right" (Carpenter 1999, 233).

Careful listening is a key component of gaining wisdom from Elders and yet this requirement is understood to take time and appropriate development on the part of the individuals receiving such Elder wisdom: "You have to listen to your Elders and to what they are really saying to you. It is not hard to understand these things. A young person is considered capable of understanding what the Elder had told him. He will gain the knowledge to live and know what the Elder had told him as he gets older and soon when he becomes an Elder himself" (Carpenter 1999, 228). That said, an Elder does not give up on the young people who do not immediately listen or understand, because the process of knowledge transference is not comprised of singular events, but through the interconnections drawn from reflections after multiple experiences. This way of learning contributes to the young people's preparedness for leadership (Carpenter 1999, 228).

For Indigenous peoples, spirituality is central to being a whole individual, "just as important as other aspects of mental, emotional and physical health …" (Wilson 2008, 89); and this spirituality is fluid and flexible: "Indigenous Knowledge systems provide us with the lifeblood of resurgence … Fundamentalism, rigidity, and exclusion too often plague our efforts to revitalize our cultures. Our Knowledge Holders teach us of a radically different way of relating to the land and of being in this world" (Simpson 2008, 84–85).

This flexibility and lack of dogmatic thinking, even about spiritual matters, is important and perhaps even central to the stories in this chapter. The juxtaposition of the modern world imposing and being imposed upon traditional knowledge and traditional thinkers is not locked into a stasis. According to Angmarlik (1999, 274), "[t]o the question of the creation story, I cannot answer it fully. Our ancestors were the ones that gave us our lives, they were ones that gave us our culture and laws. We, the present Elders, have this as we were the ones that were close to that generation. Whatever was to be followed, we followed. Nowadays it is totally different. The Elders of those days lived the way our ancestors lived and experienced. We followed it and were advised on what to do. There is no Inuk who can say this is how we were created, so we cannot answer it fully." Relating this to the concept of the non-corporeal actant (NCA), we can see the echoes in Indigenous traditions. In actor–network theory (ANT), the NCA is usually considered as the way in which individuals interpret an idea, value, concept, or belief. Often this is manifest in the actions the individual chooses to mobilize the NCA. Indigenous peoples share the world symmetrically with non-human and human actors, but also ascribe different (beyond corporeal) agency to both human and non-human actors. This provides an intersection between NCA theory and Indigenous knowledges, wherein both cases meaning is subjective and therefore non-corporeal.

Fluidity in understanding is thus a critical point to be gleaned from traditional wisdom and insight from Indigenous thinkers themselves. Uyarasuk (1999, 271–272) recognizes that it is necessary to understand the traditional knowledges from Elders and be able to situate them flexibly in their manifestation in a changing social context. It is this core fluidity that is demonstrably at play and yet occasionally challenged in the colonialist period following contact with white Westerners: "Before the White people came, we did not have many things to see or experience. Older people told us things to do and things we should not do. Some of us wanted to follow this and some of them didn't want to. However, all direction came from the Elders … They do not listen as much today as they used to. I think they listen a bit more if there is a discussion, like sitting where there is more than the talker and listener. Because there are now so many things that are distracting and things to see and experience they often do not want to listen" (Uyarasuk 1999, 271–272).

As the reader can observe, aged people were traditionally seen as an important resource for the well-being of the community; however, the article which is the subject of our analysis in this chapter challenges this belief. An aged person questions his value. Is this change a function of modernism or his internalization of doubt? How does this questioning reveal important wisdom concerning age and ageing? And how does this discourse reveal ideas which are broadly applicable in MOS?

## Theoretical Base

Time is usually connected to age and ageing. "The inauguration of time is internally related to narratives about the beginning ('creation') and ending of the world ('the end of times') and is intended to give meaning to the time of the world and the human beings in it, between their beginning (birth) and end (death)" (Baars 2012, 147). Perceptions of time are driven by events (Hartt and Peters 2016). This idea is echoed in Indigenous cultures in the concept of the Elder. In many Indigenous traditions, the word Elder (spelled with a capital E) is a title reserved for persons who have practiced the traditions and customs of their culture, shared wisdoms with the youth of their communities, and earned the respect of their communities through their lived experiences and actions (Joseph and Joseph 2014). Per Marshall (2011) "[a] person does not become an Elder when they get grey hair and wrinkles; they are not an Elder until they are recognized by their community to have received all the sacred gifts of life: love, honesty, humility, respect, truth, patience and wisdom" (p. 68). While not all persons with gray hair and wrinkles are considered Elders in Indigenous traditions and cultures, Elders are bestowed the honorary title by their community after having earned the honor through their actions and their teachings.

We situate our approach to the study of the meaning of the Elder Martin's story within the standpoint of ANT (Law and Hassard 1999;

Latour 2005) as informed by the notion of the NCA (Hartt 2013a; Hartt et al. 2014). This theoretical progression, which considers how ideas, values, and beliefs (NCAs) impact an actor–network expose the NCAs at work in the construction of Martin's story. Moreover, these ideas, values, and beliefs about ageing are fluidly manifest, consistent with Bauman's exposition of liquid modernity (Bauman 2001, 2007). As we are exploring an Indigenous person's narrative we also maintain reflexivity in a manner consistent with Indigenous methodologies (Wilson 2008; Kovach 2010). These theoretical frameworks will allow us to look at how stories help people make sense of the world and consider how people make sense of stories. Application of this integration of Indigenous philosophy and MOS ideas and methods provides a means to understand the value of Indigenous views of culture and the role of society in the modern organization.

In the performance of an actor network, stories may be the means by which actors are enrolled in an action net (Callon and Law 1982; Czarniawska and Hernes 2005; Blaser 2010). In other words, it has been argued that ideas, values, and beliefs as expressed through discourse become bodiless actants (NCAs) in such a network, with agency of their own (Hartt 2013b; Hartt and Jones 2013; Hartt et al. 2014). By this we mean that the values expressed by stories can be the NCAs that bind the actors and actants together in a network. Once bound, the action nets take to action within the network and join to act against other proximal networks. The essence of this argument is that when individuals make sense of their actions and choices, their NCAs have agency in the individual's expression through choice. As such, they influence the network much as human actors and physical actants do. These NCAs influence the praxis of memory of authors, translators, storytellers, and audiences. Consequently, the NCAs describe the contours of what are acceptable memories and positions manifest in the discursive power of the NCAs.

## Analysis

In *Research is Ceremony: Indigenous Research Methods*, Wilson (2008) suggests that research "on" Indigenous peoples does not respect or honor the histories or wisdoms of Indigenous peoples. In Inuit, as in many

Indigenous traditions, knowledge is produced in a non-linear cyclical manner that often includes Elders' shared stories or lived experiences as one of the ways to create knowledge, values, histories, and so on with the younger generations. The Elders and youth recursively co-create the knowledge. Wilson shares that "[t]he way that many Indigenous Elders teach … is to provide several pieces of information; maybe at one time; maybe over the course of several years, and then let their students come to their own conclusions about how this information comes together" (Wilson 2008, p. 120). Through readings of his (and other) works on Indigenous research methods, we have drawn our own conclusions about the ways in which we conduct research and analysis of stories with Indigenous peoples. This analysis is a sharing of our understandings of the value of age in the Inuit culture as inspired by teachings from Martin Martin, Billy Gauthier, Mina Campbell, and Angus Andersen. We believe these stories were shared publicly and/or in broad distribution to pique the minds and spirits of others. From the stories and our understandings of other knowledges (evidenced in this chapter), we reflect on age, Elders and elderly, and the value of wisdom, which comes from years of lived experiences. The analysis represents our conclusions; we do not wish to offend or disrespect our Elders in any way and diligently aspire to honor the traditions of Indigenous knowledge transference.

Martin's positions can be interpreted as expressing a network as described in ANT, along with attendant NCAs. These NCAs manifest themselves within an actor network and yet espouse an agency that is not just a product of the network in which they arise. Thus, we see Martin as a context-bound individual in tension with powerful NCAs and fluidly navigating his own understandings of age. Martin expresses concern for his younger relatives and he wonders whether he can be of value to the youth of his time, recounting the invaluable lessons his Elders shared with him. He saw change in the Inuit ways as resulting from the collision of his culture with the modern (or 'white man's' ways). His insights are represented by NCAs contesting the social space, back and forth, fluidly and dialectically redefining age and attaching value to it.

Wilson (2008) shares that in cross-cultural communication it "often takes longer to explain the context, background or meaning of a story" (p. 7). Martin Martin, Billy Gauthier, Mina Campbell, and Angus

Andersen identify as Inuit from Labrador Canada. The Inuit peoples of Labrador include many assemblages. As a cold land, difficult to traverse because of ice, snow, rivers, and a terrain of rocks and trees, Labrador (a construct of the colonizers) consists of many small communities of Indigenous peoples who had little contact with one another before the Europeans came in the seventeenth century. The Inuit most often inhabited the more coastal parts of the region. In the past they traveled along the coastal regions to seasonal hunting, fishing, and trapping grounds and very rarely encountered others on their journeys. As Martin says in his memoir, the modern world has changed the level of contact: “In such a short time we, the Inuit of Labrador, have changed in many ways. We do not carry on many of our traditions. We are forced into many new ways which we do not even understand. Also in these days we have seen Inuit from other regions, those we had only heard about but we did not know if they had traditions and cultures that were similar to ours. Now we see them in the flesh and see that our fellow Inuit share our traditions and culture” (Martin 1974).

In the analysis of the actor network we must consider the nature of the place, the time, and its people. The people and technology in Martin’s network have been changing and likely have played a significant role in the continuing change. Labrador residents include the Inuit whose traditional lands were the more coastal areas of Labrador, the Innu whose traditional lands were the more inland, the various groups of European settlers, and those who have mixed ancestries. For those residents of Labrador such as Martin Martin, whose lifetimes spanned the 1920s to 1970s, the changes were drastic and irreversible (Zimmerly 1973). In one lifetime, the way of life went from raising children on and with the land to raising children in the school systems. The opening of the Air Force base in Happy Valley–Goose Bay in the 1940s contributed greatly to these drastic and irreversible changes. Prior to the 1940s, the ways of life and livelihoods of the citizens of Labrador depended on harvest from the wild or exchanges with the Hudson’s Bay Company (HBC) for goods. The arrival of the HBC in Labrador was another point of change in the history of Labrador; however, we will focus on the changes during and since Martin’s lifetime.

ANT is concerned with how networks are formed; it considers the material and non-material actors and actants that form the network and views them as equal parties in the shaping of the network and co-constructors of meaning (Law 1999; Law and Hassard 1999; Latour 2005). The production of Martin's story is an example of the punctuation of a network, the coming together of human and non-human (corporeal and non-corporeal) actors and actants (Akrich 1992). The arrivals of the Moravian mission and the HBC, the opening of the Air Force base, and later the hydroelectric and mining projects in Labrador are examples of points of punctuation. We can use Martin's text to explore this concept.

The actors and actants that were necessary to bring this story to the reader are plentiful. They include: Martin, his memories, and the people and events that have shaped his experiences, memories, beliefs, and values; the researchers; the translator; the process of translation from the Inuttut language to the English language; the narrator who introduces the story's reprint; Them Days Incorporated and all those who have shaped the forming of this organization; the reader (audience) and all those who have shaped the understanding of the reader; and many other actors and actants. These actors and actants are coming together not at one time, nor at one place, but into one chaotic network. The resolution of the chaos is informed by themes of modernity along with those of the value of the Elder. The coming together of this network has allowed us to access Martin's story, but nevertheless without our full awareness of the systems necessary to bring the story to this place and time and without our ability to fully appreciate the vastness of the content within the message. The story itself is therefore a black box (Akrich 1992); it can be explored and provides us with clues about the network and how it was formed. "Black box" is an expression used to denote the obscurity of the internal complexity of a phenomenon. The complex systems are paradoxically hidden behind the simplicity of its face value (Latour 1999). Simply put, we can never be certain what transpired to generate a particular story from a particular experience. From the many stories of Martin's life and the many lessons he could have shared, how and why did he decide to share this one with us? How did Martin's story get into the hands of the authors and why did they want to share this story in this chapter of this book? There are unknowns hidden inside the network, just as there are messages encoded inside an airplane's black box; some messages are accessible and some are not.

Martin tells us that he valued his ancestors, "Our forefathers were strong because nothing was scarce, everything was plentiful in those past years" (Martin 1974). Through his story he shares what he values: Inuit traditions, faith, values, and connections (elements of his personal black box). He explains that these things were plentiful in those years. He is not only recalling from the traditions of the past, but invoking them as dreams for the future generations to reclaim. Because the Elders had connections to this knowledge, they are critical in the process of knowledge and traditions reclamation. Martin's story is more than a story. In the traditional sharing of an oral story, a lived story, the audience is spatially proximal to the storyteller or in the zone of proximal development (Harré 2002). Skilled members of a social group help the less skilled to develop. Psychological symbiosis occurs when the local standards transfer from the zone of proximal development into the zone of actual development. The skilled members share their knowledge in many explicit and implicit ways. Martin tells us that in his youth he was close enough or proximal enough to his Elders to ask questions, ask for clarity, and interact with the Elders to transfer local standards from the zone of proximal development into the zone of actual development. Such spatial proximity and the resulting opportunities are not substantially available to us through modern media. Proximity to Elders is diminished as the connections to extended family break down and youth seek their lessons and storytelling from modern media, rather than their own family. In this respect, location, age, and technology combine to form a different distribution of the sensible (Rancière 2006), and thus infuse the conditions of possibility with a politics different from those that existed earlier.

Martin tells us about his forefathers passing down their traditions of coming back from a hunt and sharing the harvest. Through this proximity, the poor, less fortunate, and the old shared their jokes and stories in thanks for the food that was brought to them dutifully by the young hunters, perhaps acting as a form of quid pro quo (a set of rights and duties). Thus, the company of "the poor, less fortunate, and the old" was valuable and integral in the growth and development of the youth. Positioning theory considers how people use narratives to position themselves and others, including ascribing rights (what is owed) to them and others, and establishing duties—what a person owes to others

(Harré et al. 2009). Some narratives and positions come to occupy greater precedence than others, and it may be that the prominence of some narratives, even over others that are remarkably similar, is related to spatial proximity. If so, then location and positioning are related to the emergence of an assemblage as a NCA.

These cultural influences are demonstrated in the narratives of Martin: "When learning the white society way was first introduced, or enforced, as a way of teaching our Inuit children, I strongly objected because I foresaw that in the future they would forget our Inuit language and also the word of God. I have said this because it is what I have wanted to say for ever so long" (Martin 1974). This passage reflects concern over the loss of Inuit ways under the pressure of the "white man's" ways and also expresses a value for God. The concept of God is illustrated further in the story as a manifest of the Christian culture, which was imposed on most Indigenous peoples by white missionaries. The Moravian brethren settled in Nain in 1771. Their mission was not limited to converting Inuit to Christians; they were also responsible for helping Inuit of that time to compile a written form of their oral language (Whiteley 1961). That said, God is an important NCA in Martin's story; he values the teaching of Christian ways to the children as much as teaching them the traditional ways of the people. While this may be an example of a chaos of understanding, it is also a potential *point of punctuation* (a place of alignment with or joining the network), where Inuit may value Christianity because the NCA of faith in a Creator was already always part of the Inuit ways of being.

When considering age, the aged, and societal value, a perception of the elderly as a burden conflicts with the traditions of the Inuit peoples. Martin expressed the hope for continued valuing of the elderly as knowledge bearers and knowledge sharers, and thus a reassertion of the traditional Inuit NCA. This hope may transit culture, but in the Inuit culture it has roots in traditions expressed by the contributors to *Them Days*. Whether they are Innu, Inuit, settler, most authors tell of the important lessons youth can learn from the elderly. Young people tell of how much they value their Elders and cherish their teachings. These themes and positions are clearly in contrast with a modern Western perception of the old as a burden on society and the myth of an elderly Eskimo put on an ice floe to drift away (Connolly 2008; Etzioni 2011; Gullette 2014). It seems that the young Inuit have not universally dismissed the value of their Elders; but perhaps as Martin has suggested, aged Inuit devalue themselves when they are no longer able to assert their place as Elder storytellers.

Martin also shares that he worries in his older years, because as the Elders do not have as much contact with the youth, he is unable to be as valuable to them as the Elders were to him. "When I was a young man every time I went hunting and came back successful I invited the poor, the less fortunate and the old Inuit to share my kill. After they had eaten they would joke around and tell stories of the past" (Martin 1974). Martin is telling us that his generation valued the elderly and the less fortunate or at the very least respected their contribution to the community. However, he thinks the generations that have come after him have lost this tradition. As a young person Martin valued the elderly, but as a man of 74 years he thought the young did not value the contribution of experience.

Martin's story was submitted in *Them Days* so as to reach a broader distribution (across time and place) than the youth with whom he could make personal contact. *Them Days* allowed him to share his story with youth from different times and places. The technology of modern media gives a gift of access to those otherwise unable to be embedded in the community amongst the Elders a sense of connection with the histories. Martin explains that he realizes that his value to the community has shifted: he is a provider of stories and he has "a mouth which can give guidance to our younger Inuit" (Martin 1974). But at the time he is writing (the mid-1970s), he also has the belief (NCA) that he is no longer valued by the younger generation: he believes that younger Inuit have adopted the white NCA of disposable experience.

Martin's concern about the change in the value of the Elder at that time is perhaps reconcilable, as we see in the 2014 story about Billy Gauthier, an Inuk sculptor from Labrador. Elder values and traditions (NCAs) appear once again to act as guides to the younger generations. We invoke Gauthier's story (in *CBC Atlantic Voice*, 2014) as he is in his provider/working years and is seeking knowledge of the traditional ways, looking to his ancestors and Elders to gain that knowledge. Gauthier also uses modern media to share his story and to pass along the values of the traditions.

The modern is employed by the traditional; Gauthier would not be able to create or deliver his sculptures to his audience without modern tools and networks (Law and Hassard 1999; Latour 2005), or without the traditional stories, connections, and values that are embedded in memories of social groups or the traditions of sharing those stories from one generation to the next. We identify these traditions, stories, values, and connections that are not embodied by any one actor as NCAs and explore Gauthier's use of traditions and valuing of the Elder through the concepts of the NCA (Hartt 2013b; Hartt and Jones 2013; Hartt et al. 2014).

While Gauthier makes his living creating sculptures inspired by his "personal memories … [and] insights on traditional life in Labrador" (Spirit Wrestler Gallery 2015), he also practices hunting and fishing in the traditional style. If it were not for his experiences, personal memories, and his valuing of the traditions shared by his Elders, perhaps he would not be able to create the sculptures that appeal to collectors internationally. During his CBC interview, he shared several stories about his pride in his Inuit ancestry and traditions: "I know about my Inuit ancestry and roots, and I want to take back some of that pride because I feel like it's been taken away from too many of my ancestors. And I think it's an important thing to be proud of who you are and where you come from" (Gauthier 2014). This conflicts with Martin's expressed concern 40 years earlier for the loss of traditions, as the younger generations were no longer practicing values as had been done in his early lifetime. While Gauthier's expression of traditional practice may or may not be indicative of an entire generation, the popularity of his art may support a connection to the traditions that reach a larger audience of youth. Gauthier seems to be reconciling losses of connection to culture as described by Martin and expressing a new liquid modern where modern and traditional are fused and the modern is used to mobilize or reinforce the traditional.

Gauthier shares the story about a recent sculpture that he created; it was inspired by the story of an Inuit hunter. While Gauthier has experienced the traditions himself and from his own personal experiences, he also invokes the traditions of his forefathers and in so doing, he is valuing his Elders, their beliefs, their values, their stories and experiences. He values the Elders for sharing the stories and he values their lived experience from their youth spent creating, practicing, and learning from their forefathers so as to be able to share the experiences with the next generations. For example, the Elders tell young Inuit that the hunt is a shared experience between the people and the land. Gauthier invokes traditional Inuit stories about seal hunting when deciding how to shape the stone: "So it will be emerging from the shoulder and kind of twisted around as … if he's speaking to the Inuk hunter. And basically, the seal is telling him that he is giving himself up as a way of, not just giving up his life to the hunter, but he also wants to become a part of the hunter. Because traditional Inuit belief is that these seals didn't just give up their lives, they became a part of the hunter. As you consume the seal, your body is rebuilt; replenished. The matter that the seal is made of actually becomes a part of you. So you truly do become a part of the seal, and the seal becomes a part of you" (Gauthier 2014).

This remark is from one Inuk who is currently hunting, trapping, and creating in a manner which fuses the inventions of his ancestors with the technology of the twenty-first century. The freedom returned by white colonizers to the colonized peoples of the North (as in other places) has been limited and conditional (Tester 2010; Kral et al. 2011). It appears that the movement toward self-governance has created more opportunity to learn and practice traditional teachings. The spiritual union between the people and the land, the water, and the creatures with which they share the land has become a stronger factor in Inuit communities. The beliefs expressed by Martin in 1974 that the ways of the old were gone may be changing. It could be called an Indigenous enlightenment after a dark age during which traditional values of the Inuit (and other colonized peoples) were suppressed by the colonizers. Moreover, the reflexive capacity on the part of colonizers engaged in the critical examination of contemporary neocolonialistic management practices in the North (e.g. Yue 2011) shows different configurational presentation of networks and NCAs arising out of a shared or common strata.

During his interview, Gauthier visited Mina Campbell to gather tips on cleaning a seal skin. While teaching the techniques, Campbell shared the story about how she learned the skills and from whom she learned them.

She explained that her grandmother cleaned many sealskins in spring. "Most of the community, hunters would bring the skins to her to clean. There was a couple women who did it, and she was one. So I remember asking her, after I got older—in my teenage years I didn't want to see it … And when I got older and interested, and after my grandmother had passed on, and I started cleaning sealskins, I would remember things. I would shut my eyes and I would see her doing this; pushing the grease down … Like I said, I was never ever taught that, but it's something I know what to do, because I saw her do it so much" (Campbell 2014).

Campbell recalls the visions of her grandmother's technique from her childhood and tells us that while she did not want to learn the techniques as a teenager, she "got older and interested". It was with age that this interest and pride came to Campbell and Gauthier. They both expressed how important it was to gather the traditional knowledge and share it with the next generations.

Angus Andersen, Inuttut language and Inuit tradition bearer, also recalls the teachings of Elders. He has revived the traditions of the community freezer, making traditional clothing and creating needles from bones. He has also been working to establish urban Inuit communities (UIC) for those who are away from community. "SJ-UIC Community Freezer update: We have 5 seal meat (Shoulder blades), small pack of trout, Chunk of moose meat enough for a family of 3, Seal ribs. Inbox me for more information" (Andersen 2016).

"Modern day Inuit can proudly be seen and heard celebrating an event or their culture once again. There are many young Inuit children who are more than happy to learn this great art form and help to continue proudly celebrating a rich culture" (Brown 2014). This pride seems to have brought about significant change in Inuit communities. This rebirth of culture cannot happen without the elderly because it is only those who have lived in communion with nature, passed the winter nights in traditional lodgings, and used every gram of the fruits of the hunt who can pass along the techniques and values of the past.

In an age when modern social forces are changing the Inuit, the Elders who have lived experiences with the traditional lifestyle become critical to the perpetuation of the values and beliefs. In a sense, it becomes their responsibility to share and guide the youth by sharing the value of the traditions and allowing the youth the chance to blend the traditions with their modern storylines. Gauthier, Campbell, and Andersen have shown that by 2014 some Inuit have sought out Elders and traditional ways whereas Martin in 1974 mourned the loss of connection between youth and Elder. Martin may have been speaking in the hiatus between abandonment and rediscovery of the value of Elders among Inuit youth or there may be fewer Inuit who are making connections with the Elders. Either way, those of us who are actively engaged in the movement towards the reclamation of Inuit culture know the value of our Elders. We are grateful for the stories shared and handed down from generation to generation and grateful for the organizations such as *Them Days* and *CBC Atlantic Voice* who help us to gain access to the stories.

## Conclusion

We have examined the wisdom of an Inuk Elder whose lifetime spans ages in the sense of an epoch and compared it to the perspectives of provider/working Inuit. We consider the creative focus and inspiration of a younger Inuk. In our examinations, we identify a variety of hybridities evident in such situations: hybridities of the modern and the pre-modern, the Elder and the old, the Inuit and the settler, as well as the technology and the craft. These hybridities help us to examine the collision of cultures (Bhabha 1994). Just as the European culture conflates the pre-contact Inuit Spirituality by adding Christian beliefs, the concept of Elder is blurred by Anglo-European ideas of obsoleteness. This connects the cultural life of the Inuit with the modern organization. To make sense of these we examined NCAs (beliefs, values, and ideas) within the ANT framework. This has implications for moving towards a more nuanced view of culture.

There seems to be a theme that with age comes an appreciation for and pride in culture that is harder to identify with when the zone of proximal development is filled with hybridities. These hybridities could be expressed as interrelated NCAs from Inuit culture and European influence, across many times and between generations (Bhabha 1996). It appears there is a tension between the cultures of “white” versus Inuit and in youth we are more vulnerable to feeling shame about our history and traditions, whereas with age we can find a place where culture lives side by side with the "white ways" and where both can exist. Martin (1974) speaks about the "white man's" God that he has embraced and his passion for his culture and traditions. Gauthier (2014) shared his passions for the traditional experiences and stories that inspire his art; these passions form a part of the reclamation of pride in his ancestry. Campbell (2014) expresses her passion for tradition, while she readily observes that this was not something she had a passion for as a teenager. Andersen (2016) shares his passion for the practice of Inuit traditions even in urban centers.

Elders have value for many reasons. They have past experiences with tradition and culture that they can share. They have had direct connections with our forefathers and foremothers and their traditions, values, and beliefs and they have kept those alive in perpetuity by living their values, traditions, cultures, and beliefs. We may not only be valuing them for having been contributors to our communities, but we may also be valuing them for their current contributions to our communities. They are the link between previous, present, and future generations.

That the youth are not living the pre-colonial traditions may in some ways change the traditions, but Gauthier, Campbell, and Andersen are examples of keepers of the traditions shared by their Elders and they take great pride in incorporating them in their "modern" lives. They enjoy learning from their Elders and passing on the knowledge to the youth and to others interested in the culture. The interstice between the modern and the tradition is being explored by the current generations, and while this may be an observable change from Martin's experience, he has shared with us in many ways how the aged can be valued and valuable. This narrative and its publication in *Them Days* has offered us the opportunity to explore some of the ways that, and reasons why, age can be valuable. Drawing forward in time from the 1970s (when Martin was writing) to the present we can also observe the way changes in society change the interaction (as per Rancière). At the time of Martin's writing Inuit communities had been isolated from one another by interruption of their traditional lifestyle; however, in the 2010s these interventions are mitigated by both an increase in respect by the governments of Indigenous peoples and technological interventions such as Facebook and other web-based opportunities to share.

The discussions of Elder, elder age, and experience described by Indigenous scholars form theory which helps us to recognize the importance of identities, stories, and traditions and how they may inform our present. The NCA helps us to recognize values, beliefs, traditions, and culture in the network of actors and actants in the lived stories of our Elders. These help us to understand the ways in which NCAs contribute to the organizing and mobilizing of knowledges within networks. These theories have an embedded ontology that is respect for the equality of all humans, non-humans and ideas, values, and beliefs. To redress the distrust that is often afforded to the Western research practices (Smith 1999, 2007), we have made an effort to respect Martin and share the lessons he has taught us. His story has value in our pursuits to connect with the Inuit culture. We are grateful for Martin and all those actors and networks that have provided us the opportunity to learn from this narrative. We are suggesting that it may be possible to use Western research practices in the study of Indigenous knowledge; it is necessary to expressly incorporate values of respect so as to honor Indigenous peoples' knowledge and experience.

## Notes

1. According to the Inuit Circumpolar Council (ICC) there are approximately 160,000 Inuit in Alaska/United States, Canada, Greenland/Denmark, and Chukotka/Russia. Inuit people's homelands traditionally spanned the circumpolar north.

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# 3

# Reifying Age-Related Employment Problems Through the Constructions of the "Problematic" Older and Younger Worker

Cara Lynn Scheuer and Albert J. Mills

## Introduction

In recent years age has been presented as being one of the most pressing issues for contemporary organizations and managers (Kapoor and Solomon 2011). As a result of these concerns, a growing body of research has begun to investigate age-related employment issues such as those pertaining to generational conflicts (Deyoe and Fox 2011), age stereotypes and discrimination (Barnes 2013), and involuntary unemployment (Gallo et al. 2006). Although limited in number, a small subset of these studies has investigated age from a social constructionist and/or critical framework (e.g. Riach 2007). In these studies, instead of treating age as

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a 'given' – fixed category, the authors investigated the deep-rooted issues surrounding age by exploring how certain actors and/or concepts have been socially constructed, sustained, and/or resisted by powerful discourses (Thomas et al. 2014). Given the valuable insights that these studies have offered, management scholars have expressed the need for more critical (and qualitative) interrogation of age and age-related issues, such as those pertaining to social identity and power (Thomas et al. 2014). This present chapter answers this call for more critical research on age by investigating the way the older and younger worker has been discursively constructed within business textbooks, as well as the power implications of these representations.

## The Older and Younger Worker

We focus our analysis on the older and younger worker because both have been represented by scholarly and popular discourses as being deeply problematic for contemporary organizations. With regard to the older worker, there has been a concern raised about the problems associated with "aging populations, the greying of the workforce, and the changing nature of retirement" (Pritchard and Whiting 2014, p. 1606). There has also been unease about younger workers, particularly with respect to their seemingly unconventional work behaviors and attitudes (Laird et al. 2015). In addition to their individual "problems," older and younger workers have also been represented as eliciting problems when they interact with one another (Deyoe and Fox 2011). Unfortunately, "as individuals, organizations and societies struggle to deal with various 'problems' associated with different ages and the supposed clashes amongst these age groups, they help to create those very problems, consciously and unconsciously perpetuating age stereotypes and conflicts rather than transforming them" (Thomas et al. 2014, p. 1570).

By approaching our research through a critical lens we aim to contribute to this latter process of transformation. Specifically, by employing Critical Discourse Analysis (CDA) on a collection of business textbooks, we show how powerful discourses have reified the very notion of the "problematic" older and younger worker and, as a result, have actually perpetuated certain age-related employment problems. In exposing the constructions of the older and younger worker and the power relationships embedded within them, we seek to encourage new understandings of these individuals as well as the age-related problems that have accompanied them.

## Discourse and Power

In unpacking the understandings of the older and younger worker, we draw upon the notion of discourse and power. Discourse is a group of authoritative "statements, which provide a language for talking about a topic and a way of producing a particular kind of knowledge [or understanding] about a topic" (Du Gay 1996, p. 43). In this sense discourse "refers both to the production of knowledge through language and representation and the way that knowledge is institutionalized, shaping social practices and setting new practices into play" (Du Gay 1996, p. 43). When research on discourse is conducted it is typically done so through the analysis of written or spoken forms of texts, such as news articles, company documents, or, in our study, business textbooks. Discourse influences the creation and dissemination of such texts, which dictates the ways in which certain topics (e.g. age-related problems in the workplace) and its affiliated actors (e.g. the older and younger worker) can be discussed, reasoned, and/or understood (Davies and Harré 1990). In many cases, discourses (and the texts that sustain them) are so dominant and powerful that they become "unquestionably accepted by people as common sense, received wisdom, science, or truth" (McLaren and Helms Mills 2010, p. 410). However, this power is not everlasting. Instead, it must be maintained through dominant actors or sites of power privileging and legitimizing certain language, and marginalizing and closing off of others (Hardy and Phillips 2004). Thus, underlying the creation and dissemination of social texts are struggles for power and control (Phillips and Hardy 2002) that "provide discursive cues to these power relationships" (Ainsworth 2001, p. 31). In analyzing these texts the power implications of the different constructions of particular subjects, such as those associated with the older and younger worker, can be exposed and perhaps even transformed.

# Method

## Critical Discourse Analysis

CDA is a form of textual analysis that focuses on the reproduction of power relationships and on how structures of inequality are reproduced in discourse (Fairclough 1995). While a range of methodologies has been used to study age in organizations, only CDA interrogates the concept itself (Ainsworth and Hardy 2007). Given our aim to challenge the very idea of the older and younger worker and the age-related problems that are associated with them, we feel that CDA is the most appropriate method to undertake this. In the design section that follows, we explain in greater detail how we carry out CDA. However, we will first discuss our reasoning for the selection of the business textbook as our primary data source.

## Business Textbooks

Business textbooks were selected because of their discursive and ideological tendencies (Mir 2003) to "reflect the dominant paradigm; as an active agent in its production and reproduction" (Foster and Mills 2013, p. 444). The business textbook was also chosen because of the prominent role it has played in business education in North America. For example, in the USA during the 2011–2012 school year there were 367,000 degrees conferred in the fields of business, the most of any other discipline (US Department of Education 2015). With textbooks now being adopted as one of the primary pedagogical tools of business education (Mills and Hatfield 1999), it is safe to assume that a significant portion of these graduates are likely becoming exposed to and perhaps governed by the ideas presented within them. Further, owing to its applied nature, the business textbook is also being referenced by practitioners as a way of informing their management approaches and behaviors. Indeed, "because textbooks impart ideology as well information, the discourses found in those books have real and tangible effects on what happens at work" (Foster and Mills 2013, p. 462).

To obtain our dataset, we drew from a repository of 450 US business textbooks published from 1914 to 2015. We reviewed 14 textbooks in total, randomly selecting at least one textbook from each decade. The selected texts included general business, management, organizational behavior, personnel management, and human resource management textbooks. When there was a minimal amount of age-related content found within a given textbook, additional textbooks were referenced in that decade to ensure that the missing content was not an anomaly. We focused our analysis on the USA since many of the age-related employment issues, particularly those related to generational conflicts, seemed to have originated from this region (Johnston and Packer 1987). Nevertheless, while our analysis is situated in the US context, it is likely that many of the representations of older and younger workers found within these texts are also applicable to other regions, such as Canada and Europe.

## Design

We carried out our critical discourse analysis in a series of stages. First, for each selected textbook we conducted a high level scan of the entire text. The purpose of this exercise was to gain a sense of the overall structure, content, and focus of the textbook. Next, we reviewed the text with an age-sensitive lens. This involved referencing the Table of Contents and Index, making note of any concepts associated with age or the older and/or younger worker. Since the textbooks were searchable PDF files, we also conducted searches for specific age-related keywords (see Table 3.1). We then extracted the passages that corresponded to the identified index and keyword terms and compiled them in a single document. We then scanned the entire textbook again, looking for any age-related content that may have been overlooked. Any passages that made reference (either explicitly or implicitly) to age or to older or younger worker(s) were extracted and included in the dataset. We followed this same process for each of the textbooks starting with the oldest textbooks and continuing in chronological order. The final dataset comprised of 82 pages (single-spaced) of written text.

**Table 3.1** Index terms/concepts and keywords searched within textbooks

| Index terms/concepts | Keywords |
|---|---|
| Age, older workers, younger workers, wages and pay, apprenticeships, education and training, recruitment, promotion, retirement, careers, career development, seniority, special employment groups, diversity, health and safety, benefits, demographics, life insurance, long-service, tenure, recession planning, discrimination, stereotypes, status congruence, motivation, fatigue, eyesight, merit, skill, selection, adjustment of employees, aged employees, change, accidents, fair employment practices laws, individual differences, job adjustments, securing employment, induction of new employees, insecurity of older workers, Age Discrimination in Employment Act, status, accidents and disabilities, campus recruiting, career planning, dealing with career plateaus, social security, compulsory benefits for employees, discrimination in hiring, health insurance, pension and retirement plans, Medicare, Occupational Safety and Health Act, role in preventing illness and accidents, orientation of new employees, pay, minority and disadvantaged people, job ranking method, demographic changes, health problems and stress, age and job satisfaction, age stereotypes, bonus plans, able-bodiedness, adult transitions, age differences, workforce diversity, downsizing, demographic characteristics, immaturity, internships, lifetime employment, adult learning, work expectations of baby boomers, baby boomer generation, career issues, work expectations of Generation Y, work expectations of Generation X, power and status differences in hierarchies, workplace expectations, age bias | Age, young, old, elderly, boy, girl, youth, baby boomer, millennial, Generation Y, Generation X, generation, seniority |

Once all the relevant passages were compiled, we began our analysis of the data by focusing on its linguistic and discursive characteristics. This included making note of the words or adjectives used to describe older and/or younger workers, the characteristics or behaviors that were ascribed to them, the types of stories or examples in which they were referenced and the ones in which they were omitted, and the connotations of these characteristics, behaviors, and stories. The analysis of the text in this manner led to the identification of five themes, which we elaborate on in the analysis section.

In the discussion, we summarize the representations of the older and younger worker within the management textbooks. We also review our findings with respect to the existing literature on age as well as to certain broader discourses such as able-bodyism, gender, and generational differences. Also integrated into this section are discussions of the power implications of our findings. Key questions considered were: (1) who was being marginalized, excluded, and/or ignored within the textbooks, (2) who was being privileged, included, and/or revered, and (3) who stands to benefit from these selective representations?

# Analysis

## The 'Problematic' Older Worker

Throughout the textbooks older workers were described as having "some big problems" (Davis 1957, p. 413). Up until the 1940s, the majority of the problems associated with the older worker involved issues of deteriorating health, mental, and physical capabilities, all of which were depicted as hindering older employees' ability to perform their jobs effectively. For instance, in Robbins (1914), trade unions were described as facing a "serious question", namely "what to do with the old and incapacitated" (p. 158). In other textbooks, older workers were described as being "slower and less adaptable" (Davis 1957, p. 416), suffering from certain medical ailments, such as "headaches, blurred vision and dizzy spells" (Newman et al. 1967, p. 323), not being able to keep up with the work demands or doing a full day's work owing to a decline in their "health and vigor" (Davis 1957, p. 416), and as being disabled from work injuries for longer periods of time. Continuing into the more recent textbooks (i.e. 1980s onwards), older workers were again described as being "lower in physical capacity" (Steers 1988, p. 111), as "more likely than younger people to be unproductive" (Schermerhorn et al. 1997, p. 44), as having problems with "learning and flexibility" (Schermerhorn et al. 1997, p. 44), and as having "a sense of inertia" (Schermerhorn et al. 1997, p. 44). As workers progressed later in the career stages, "health and ageing" were also portrayed as a more "relevant concern" (Schermerhorn et al. 1997, p. 114).

Another recurring older worker "problem" in the textbooks was retirement. Up until the 1970s, the core argument made within the textbooks was that older workers "needed" to retire to make room for the newer and more productive younger workers. Organizations and managers were depicted as being faced with the difficult decision of determining when and how to enforce retirement of their older workers. However, regardless of the strategy employed, decisions over retirement were portrayed as being burdensome and stressful for organizations.

In the mid-1900s, additional problems associated with the older worker began to emerge within the textbooks. One of the new problems was the burden of employing older workers. For instance in Davis (1957), organizations were described as preferring not to employ older workers, and, ideally, to not "have to bother with them" altogether (p. 413). Nonetheless textbook authors advised managers to devise ways to accommodate older workers; advice that had little to do with the interests and/or well-being of the older worker or because it was the right thing to do from an ethical standpoint. Rather, it was a way of evading the added costs and legal problems that could arise from this "big [and growing] employment group" (Davis 1957, p. 413).

> It [older workers] is such a large group in the labor force and in politics that it cannot be ignored. The conclusion here is specific and significant: *unless management recognizes the human relations issues in the situation and makes reasonable provision for employing older persons out of work, laws will be passed prohibiting employment discrimination against older workers.* (Davis 1957, p. 414)

Starting in the 1980s, additional problems were linked to older workers such as those associated with the concept of career stages and adult lifecycles, particularly the supposed plateau and decline stages associated with older workers. For instance, in the plateau stage older workers were described as facing the threat of stagnation: "Some individuals continue to grow and develop, while others begin to stagnate and retreat. Certainly, in terms of wasted employee time and energy, this stage is where the greatest problem lies" (Steers 1988, p. 569).

Throughout the textbooks, career plateau was also presented as being a problem for the younger worker. However, it was still the older worker who was identified as being the source of these problems—being blamed for remaining in their positions too long and subsequently restricting the advancement opportunities for younger workers.

> While plateauing, like aging, is inevitable, in years past it was a more gradual process … Today the situation has changed … The top of the pyramid is expanding much more slowly than the middle, and the managers who advanced rapidly during the growth boom of the 1960s are now at or just below the top … As these managers continue in their positions, the queue of younger, aggressive aspirants just below them is likely to grow longer, with spillover effects on opportunities and mobility rates throughout the organization. (Daft and Steers 1986, pp. 55–56)

Beginning in the 1990s, there appeared to be a shift in the treatment of the older worker within the textbooks. From this decade onwards, authors no longer discussed the need for older workers to be eased out of their positions and into retirement. Instead, the authors were encouraging managers to retain older workers longer. This new mentality toward the older worker was likely a result of the new emphasis being place on diversity management (Johnston and Packer 1987) and also the changes in workplace demographics during this time period (Strachan et al. 2010). However, with older workers making up significant portions of the workforce, managers were faced with yet another "older worker problem," namely how to retain this group of workers and avoid labor shortages.

## The "Problematic" Younger Worker

Just as older workers were positioned within the text as being problematic for organizations, so were younger workers. Throughout the textbooks, younger workers were portrayed as clumsy, awkward, inexperienced, immature, irresponsible, and unreliable—creating unwanted challenges and problems for the organization:

> Youthful workers and those inexperienced in the work being done are especially likely to suffer accidents. The beginner is awkward in work habits and the work situation is likely to provoke mental confusion … The exuberance of youth is reflected in pranks, inattention to task at hand, and a lack of care. (Anderson et al. 1942, p. 348)

> [A] foreman in following through personally a sample order of shoes … sends the nearly finished shoes from one machine to another by a boy. The boy, in his haste, trips and falls, spilling some black dye he is carrying upon the tan leather. The shoes are ruined and the foreman's dream of 'making a hit with the big bosses is blighted … (Smith 1928, pp. 131–133)

In the 1970s, the problems with younger workers became even more pronounced. This change was likely prompted by the shift in work attitudes and norms that were believed to have taken place during this decade. In particular, popular media writers "were speaking out critically against the culture of narcissism among this new generation of [younger] workers", which became labeled as the "The Me Generation" (Land 1990, p. 75). Young workers were associated with "a steady decline in worker motivation and loyalty[;] a 'don't give a damn' attitude[;] no respect for experience, no concern for the well-being of the company, [and] last but not least … no appreciation for the relationship between hard work and good living" (Byars and Rue 1979, p. 57).

The characterization of younger workers as problematic continued into the more recent textbooks as well (i.e. 1990s and onward). They were portrayed as being self-absorbed, entitled, seriously lacking in interpersonal skills, and only being concerned about their personal development and advancement opportunities, rather than being committed to their organizations. Managers, on the other hand, were described as being forced to deal with these new problems, such as by "develop[ing] new influence skills" (Osland et al. 2007, p. 492) or devising new ways to incentivize and motivate this rebellious, overly demanding, and highly "problematic" age group.

> As twenty-somethings enter the workforce, they often bring an unprecedented sense of entitlement. This can translate into startlingly high expectations for their pay, their responsibilities, and their job flexibility, but little willingness to 'pay dues.' Many have no expectation that their employees will be loyal to them, and they don't feel that they owe their companies strong loyalty. (Kelly and Williams 2015, p. 254)

## Older/Younger Worker Conflict

Throughout the textbooks, the younger and older worker were portrayed as creating additional problems for the organization, as a result of the conflict they experienced with one another. One of the key tensions between younger and older workers revolved around the idea of seniority. For example, younger workers were portrayed as a threat for supposedly pushing older workers out of their positions or for being selected over the older and more tenured workers for employment opportunities:

> In the plateau stage older workers are 'dealing with threats to position from younger, more aggressive employees'. (Steers 1988, p. 571)

> … a crew of about twenty girls had been hired to undergo training for an expected spring rush. At the end of the year … a shortage of work occurred. The management decided that in giving out what little regular work there was in the department, preference should be given to the group of apprentices so that their training would not be interrupted. Consequently, as work grew less, it became necessary to transfer long-service employees while the apprentices remained on their own jobs … striking up an unfailing sense of sympathy and outrage among the long-service people there … (Smith 1928, p. 168)

Another older/younger worker problem that emerged during the latter part of the twentieth century was status incongruence, which occurs when a person's status characteristics (e.g. age) appear inappropriate for the person's position or role. Although not explicitly referenced, the notion of status incongruence was first alluded to in the textbooks published in the mid-1900s. For instance, in the passage below, a young office manager was portrayed as experiencing a backlash by the "old employees" when he tried to overstep his boundaries and exercise more authority than he is technically "allowed" to enact as a younger employee.

> The company replaced him with a young man … It soon became evident that his conception of the duties of an office manager reached far beyond the expectations of the old employees. He wanted to install new systems that extended his authority to such things as controlling sales expense and

> scheduling production. His efforts led him to disputes with the sales manager and a head-on collision with the plant superintendent. Before the duties of the office manager were finally clarified, so much personal friction had been generated that the young man had to be let go. (Newman et al. 1967, p. 46)

In the 1980s, the concept of status incongruity was made more explicit in the textbooks, focusing on the eliciting of a great deal of tension among the older and younger worker. This, in turn, created additional problems for the organization.

> Status incongruence exists when a young fast-track manager is promoted to a level typically held by more senior managers. Status incongruence can present a problem for everyone involved. Coworkers often feel hostility and jealousy toward an individual who has risen above his or her station … Hence, organizations that reward high achievement (instead of seniority) must accept some conflict resulting from status incongruence. (Daft and Steers 1986, p. 194)

## The "Business Case" for the Older/Younger Worker

While older and younger workers were generally presented within the textbooks as being highly problematic, there were some instances in which their positive qualities were emphasized. However, in these situations, the qualities typically featured were those associated with the "business case" for diversity (i.e. their usefulness to organizational performance and productivity; Kaasila-Pakanen 2016). For instance, older workers were presented within the textbooks as contributing to organizational performance as a result of their experience, knowledge of work, judgment, loyalty, shop attitude, and dependability. Similar to the older workers, younger workers, particularly in the textbooks published in the 1950s onward, were also portrayed as occupying desirable traits and characteristics, with these positive attributes also mostly being associated with the "business case" for diversity. For instance, younger workers were described as being highly motivated, aggressive, optimistic, success-driven, technologically savvy, innovative, creative, competent, bright, outstanding, flexible, and as being willing and able to offer new and profitable ways of conducting business.

When the textbook authors highlighted the positive attributes of the older and younger workers, it was also often in the context of the "deficiencies" of the opposing age group. For example, as is demonstrated in the following passage, older workers were portrayed as contributing to the "business case" of diversity by helping to train and socialize the younger and less experienced worker.

> It is a good idea to have some qualified employee train new workers about the plant before they begin work or soon afterward, so that they can see for themselves what is being done and comprehend their place in the scheme of things. Sometimes an elderly or retired workman, ripe and mellow with age, is most suitable for this task. (Anderson et al. 1942, p. 326)

Younger workers were similarly positioned within the textbooks as making up for the shortcomings of older workers. For example, older workers were described as being old-fashioned" (Daft and Steers 1986, p. 69), complacently stagnant and out of date (Smith 1928, p. 80), resistant and/or incapable of change. As the "deadwood" (Daft and Steers 1986, p. 506) of their companies, older workers were positioned as needing to be "fixed," "corrected," or managed by their organization, or in some cases, by younger workers themselves. This was particularly apparent in the following passage in which an older worker was described as almost causing irreversible damage for not focusing on the growth and long-term profitability of the organization.

> The salesman was an older man … when he was replaced, it was discovered that his territory was in bad condition, for he had neglected to cultivate new customers … had glossed over troublesome service problems and had failed to cultivate the younger men in the customers' organizations. Several years of hard work were required before the territory again produced the volume it should. If other, more intangible, factors had been watched, the deficiency in the old salesman's performance would have been noted before too much damage was done. (Newman et al. 1967, pp. 684–685)

## Intersectionality of Age and Gender

Although gender was not originally intended to be a focus of this study, upon reviewing the textbooks, we noticed some patterns with respect to gender that warranted mentioning. Most notably was the absence of the female subject in the majority of texts, particularly in the textbooks that pre-dated the Civil Rights Act of 1964. As is reflected in the various passages that we included in the prior sections, when workers were discussed by textbook authors, the words "men," "workman," "he/him/his," or "boy" were predominantly used. In other cases, the textbook authors described older and younger workers using seemingly gender-neutral language, thereby perpetuating the gendered idea that the ideal employee is assumed to be male and so the gender of worker does not even need mentioning.

Amidst the excessive coverage of the male worker there were a handful of passages about younger girls or older women in the workplace. However, in these stories the females were typically portrayed in a negative light:

> Work for women in industry is less hazardous. The work is light, men porters do the lifting and carrying, and less danger is involved in attending or operating machines. (Anderson et al. 1942, p. 348)

> Yet industrial fatigue is not a problem to be dismissed lightly, for individuals, especially pieceworkers, occasionally set too fast a pace. Girls working with small metal parts, like those of a radio or electric motor, may substitute strenuousness for smooth rhythmical method, and work under a nervous tension that is unduly fatiguing. (Balderston et al. 1937, p. 241)

Throughout the textbooks, we also noticed female workers being described as occupying similar characteristics to the younger worker, but again typically as it related to the younger worker's more negative attributes. For instance, in the first passage below it is a female, not a male, who is described as being the "clumsy" and inexperienced young employee. Likewise, in the second passage below both younger workers and female workers are displayed as occupying the "undesirable" traits of disloyalty and selfishness. In the rare occurrences in which younger workers were attributed positive characteristics, it was typically traits that are more stereotypically masculine such as being aggressive, dominant, or task-oriented.

> A girl fresh from school was employed in a paper-box factory. Her fingers were clumsy. She held her glue brush awkwardly. She got more glue on her fingers than on the edges of the paper where it belonged. She tried her best, but she could make boxes neither quickly nor well. (Smith 1928, pp. 2–3)

> Doubtless most workers would prefer to have the equivalent of the cost of the personnel activities added to their money wages. This is true of the younger employees of both sexes, but especially of the unmarried women. The latter expect to become married and thus think of their jobs as temporary. Consequently, they feel that they personally will not benefit from pensions and death benefits. The same type of thinking is also found among the younger men. As men become older and assume the responsibility of a family, however, the thoughtful and unselfish ones recognize the need for protecting their dependent; and as they become still older and approach more closely the age of retirement, pensions take on new meaning. (Balderston et al. 1937, p. 440)

Females were also positioned by the textbook authors as being the source of conflict in the workplace. For instance, in the example referenced in the "Older/Younger Worker Conflict" section (see p. 18), in which the long-service "female" workers were being transferred to new departments while the young "female" apprentices were allowed to remain in their jobs, the individuals that were described as raising grief over this decision were the older women. There was one subject in this story, however, that was not female, the male manager:

> Finally, the situation became so extreme that intervention by the higher management was necessary … With considerable difficulty he finally traced his way back through the maze of trivial complaints which these women made until they told him the incident from which the disturbance originated … As such, the incident was readily accepted as merely an oversight. The storm thus blew over as rapidly as it had gathered. (Smith 1928, pp. 168–174)

In characterizing the male manager as the hero in the story and the older female workers as being the ill-informed employees whose antics were negatively impacting company productivity, the textbook authors served to marginalize and belittle the older (and female) workers.

## Discussion

In employing CDA on a collection of business textbooks, we exposed the representations of the older and younger worker and the age-related problems associated within them. Throughout the textbooks, older and younger workers were consistently constructed as being problematic despite the significant social, economic, and political changes that had taken place during the 100-year period in which the reviewed textbooks were published. While the specific types of "problems" may have changed, the underlying stereotypes of older and younger workers being inadequate and troublesome remained the same. This speaks to the incredible amount of power and resiliency these representatives and associated discourses have had over the years.

On the one side of the age spectrum, older workers were situated as being problematic because of their declining mental capabilities, physical strength, and health, outdated skillsets, and because they remained in their positions either too long or not long enough (depending on the time period and the labor demands at that time). Age in this respect was very much intertwined with the discourse of gender and able-bodyism (Winker and Degele 2011). The first privileges the male employee—both old and young, while the latter privileges those that are physically healthy (i.e. able-bodied) because these individuals are believed to be more adept at contributing to the productivity and profitability of the organization. This privileging of gender and able-bodiedness is not unique to just textbooks. For instance, in his classic book *The Principles of Scientific Management*, Frederick Taylor describes the prototypical worker as being a "naturally energetic workman" who was so physically fit that he could "trot back home for a mile or so after his work in the evening, about as fresh as he was when he came trotting down to work in the morning" (Taylor 1914, pp. 43–44). Throughout the textbooks that we reviewed, it was made readily apparent that the ideal type worker was a male "at the highest point of mental and physical efficiency" (Robbins 1914, p. 86). With older (and female) workers consistently being portrayed as lacking in these areas, it meant that they were no longer valued members of the organization and of society. Managers, on the other hand, were encouraged (and empowered) by the textbook authors to handle or control these "problematic" (non-able-bodied) older workers through implementing certain techniques such as job reassignment or job reengineering "so that the infirmities of age are no handicap in performance" (Davis 1957, p. 416).

At the other end of the age spectrum were the younger workers. Although less salient and occurring less frequently than the older workers, this group was also characterized as problematic throughout the textbooks. For example, younger workers were described by the textbook authors as lacking in knowledge, experience, and maturity, and as being clumsy, irresponsible, unwilling to pay their dues, unmotivated, and disloyal to their organizations and managers. Many of these negative characterizations of the younger worker are consistent with the more contemporary discourses surrounding generational differences (Foster 2016). As part of this discourse, the "modern-day" younger worker is characterized as being entitled, disrespectful, and uncommitted. This discourse also positions the contemporary younger workers as being the most problematic generation of workers: "most of the concern has focused squarely on the youngest so-called generation – the 'millennials' or 'Generation Y' – suggesting that the workplace was a relatively homogenous space before this latest cohort of workers entered" (Foster 2016, p. 2). Our findings contradict this discourse by showing how younger workers have actually been situated as problematic as far back as the 1910s, including during the post-World War II baby boom era. This is particularly noteworthy since many of the producers of the contemporary discourses associated with the "problematic" younger worker are individuals born during this era (i.e. those currently in their 50s or 60s). These selective characterizations of the younger worker also served to further empower organizations and managers by legitimizing them in exercising new forms of authority and control over these so-called overly "problematic" contemporary younger workers. Further, with the US Age

Discrimination in Employment Act, in 1967, only offering protection to those over the age of 40, it has left this younger worker group even more susceptible to the control of the organization/manager.

Both older and younger workers were also consistently positioned as problematic owing to the conflicts that existed between these two age groups. This included heated debates over seniority, competition over job or advancement opportunities, status differentials, or through clashes in work styles and attitudes. While these conflicts may indeed be occurring in workplaces, by focusing so much on the negative exchanges and failing to provide examples of positive and healthy intergenerational work arrangements, the textbook authors serve to perpetuate the differences among these age groups. Such characterizations also reinforce "the notion of a pre-existing rift between young and old" (Pritchard and Whiting 2014, p. 1613), a discourse that is very much alive and well to this day.

Throughout the textbooks, the workers, who were in the ideal age range (i.e. not too young or too old; Thomas et al. 2014), were considered to be the prototypical worker and were privileged as a result. However, there were some instances in which the older or younger worker was attributed with more favorable characteristics; characteristics that, for the most part, were associated with men and masculinities. For the older workers, this favoring primarily occurred as a result of their experience. Older and more experienced workers were described as being called upon by organizations to help mentor, develop, and/or train the younger employee. Since older workers were needed in this capacity, they were able to contribute to the "business case" for diversity and thus became more valued members of the organization. More often, though, it was the younger workers who were lauded for their contributions to the "business case" by supporting the capitalist notions of progress and development**.** These more favorable characterizations of younger over older workers are consistent with the dominant discourses on age, which tend to privilege the young and the new over the old (Trethewey 2001). However, despite the privileging of older and younger workers in some instances, through these selective (and mostly negative) representations of the older and younger worker, organizations and managers were ultimately afforded with the power to control these "problematic" work groups.

With respect to the intersectionality of age and gender, as a whole female workers appeared to be ignored almost entirely by the textbook authors, but also more specifically as an age related issue; that is, no consideration was given to potential career differences between men and women and the likelihood that the older workforce consisted largely of male employees (with high seniority). Furthermore, the way in which female workers were typically characterized within the text (e.g. as clumsy, inexperienced, weak, performing less physically demanding work, and creating workplace conflict) resembled the negative representations of the older and younger worker. In Ainsworth (2001), the author uncovered a similar finding in which the "older worker identity was constructed in relation to a number of other 'disadvantaged groups' in the labour market, including women" (p. 38). By the textbook authors associating female workers with other "subordinate" work groups (i.e. younger and older workers), it stripped each of these groups of their individual identities. Characterizing workers in this manner also perpetuated additional workplace conflicts and problems with these disadvantaged groups being "constructed as competing with each other for attention and resources from government, welfare groups, labour market service providers, and employers" (Ainsworth 2001, p. 38). Once again, these discursive maneuvers on the part of the textbook authors served to empower the (male) manager with the authority to exercise control over these "problematic" older and younger (female) workers.

## Conclusion

The present study deepens the understandings of age-related employment issues by showing how powerful discourses, such as those reflected within the reviewed business textbooks, have contributed to the construction of the "problematic" older and younger worker. We have also offered a historical perspective to these age-related employment problems by investigating how the representations of the older and younger worker have both changed and remained consistent over a 100-year span of time. In doing this, we were able to challenge some of the contemporary discourses on age such as those that suggest it is mainly the newest generation of younger workers that is creating problems in the workplace. Lastly, we showed how business textbooks, in their constructions of the older and younger worker, have facilitated certain power imbalances among these individuals. This has included the privileging of older workers over younger workers, with respect to their experience, the privileging of younger workers over older workers with respect to their able-bodiedness and propensity for progress, innovation, and change, and the privileging of males over females. However, in each of these cases, the main actors that stood to gain were the organizations/managers. As a result of the authors' selective representations of the older and younger worker and their affiliated employment problems, organizations/managers became empowered and justified in their actions to control these "problematic" work groups. Ultimately, by exposing the constructions of the "problematic" older and younger worker and the power dynamics underlying these representations, we attempted to encourage new ways of thinking about these work groups. In particular, we hope that this study will alert others to the possibility of an alternate reality, one in which age-related employment issues are no longer perceived as stemming from older or younger workers, but rather from the powerful discourses that have been reifying these problems over the past 100+ years.

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# 4

# Ageing, Gender and Leadership: A Study Based on Tolkien's *The Lord of the Rings*

Iiris Aaltio

## Introduction

Ageing is one of the basic categories of human identity, also in organizational settings. Age can be defined as "a body-based system of social categorization" (Ainsworth 2002). In addition to chronological age, which refers to one's calendar age and number, the concept of age is multidimensional (Sterns and Doverspike 1989). It is at the same time an objective and subjectively felt category. Nowadays research on ageing is especially topical because a large number of children born between 1940 and 1950 are rapidly approaching the traditional age of retirement (Walker 2005; Henkens et al. 2008) and there even appears to be a new generation of 60+ employees. Employer behavior towards ageing employees is often based on stereotypical assumptions concerning their work ability and job performance, and the aged population is often a victim of downsizing or restructuring (Buyens et al. 2009). This is true even if the

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assumption of a general decline in skills and abilities with increasing age is simplistic and incorrect (Kanfer and Ackerman 2004; Ilmarinen 2006). Because of retirement costs, societies prefer the workforce to continue working into later life, and steps have been taken to close the early exit routes in many European countries (Walker 2005; Henkens et al. 2008). Some studies relating to human resource management (HRM) and ageing employees focus on the questions of later life job satisfaction (Guest 2011), and feeling equal based on age is an important dimension of it (Macdonald and Levy 2016). Therefore, reducing anxiety about ageing may improve job satisfaction in the workplace.

As age is a social organizing principle that defines, unites, and divides individual employees as well as work groups, worker identity as "old" or "young" is socially constructed (Ainsworth 2002). Physical ageing is linked to changes in the cultural and social status of older people (Warren 1998). It is claimed that gender and age are intertwined because they are both a kind of power-based relation and refer to cultural knowledge that conceptualizes both age and women and men (Calasanti and Slevin 2006). There are also national differences concerning age and ageing: in Western societies ageing is often seen negatively and in the context of decline, whereas in Asian cultures that emphasize the relation between authority and age it is usually seen more positively (Leung 2000). However, in Western organizational contexts, there is also ambivalence concerning the value of ageing employees. Old age may bring valuable expertise and wisdom with crystallized intelligence (Kanfer and Ackerman 2004), but on the other hand, stereotypes may see them as in a negative light: less productive, less healthy, and not able to cope with change compared with younger employees (Brough et al. 2011). So, even if the recent research has shown that the assumption of a general decline in skills and abilities with increasing age is simplistic and incorrect (Kanfer and Ackerman 2004), the construction of the concept of old in organizations is mainly related to the loss of skills and compensation issues.

Societies also hold ancient mythologies and myths (Gherardi 1995; Kostera 2008), kept alive through stories. As there is a "linguistic turn" currently occurring in the social sciences, stories and storytelling have become woven into many academic discourses. As argued, ancient stories are also alive in the contemporary world and reinterpretations can give new light to something about work and organizations (Gabriel 2004). Traditionally, myths are about creation, supernatural beings, heroes and heroines, adventures, and often the participants of the stories are devoid of mortality. So age and ageing are even central in many of the myths and mythology. In this study, the focus is on representations of ageing, also from the gender point-of-view, as they appear in Tolkien's fiction trilogy of *The Lord of the Rings*, based on mythology and stories and made into a mainstream feature film.

## Gender, Age and Identity in Organizations

Age and gender are both interrelated systems, which shape life situations (McMullin 1995). The constructionist perspective towards age identity and gender views them as socially accomplished and culturally constructed. Old age can be a target for cultural ambivalence and even hostility in societies that admire youth (Ainsworth 2002). There is, in general, evidence of gender difference so that in work life, women are more exposed to social devaluation in ageing compared with men, even if this does not relate to actual job performances (Powell and Hendricks 2009).

Irni (2009) identified that gendering practices in organizations resulted in the association of older women with negative features. She concluded that the resistance of older women towards unsatisfying practices was explained in organizations in terms of individual gendering characteristics associated with ageing and midlife biography and biology, rather than seeing it as a genuine complaint. In another study by Ainsworth (2002), using discourse analysis, it was shown how the category female in a public inquiry disappeared and was marginalized in the final report, even though it was evident in the actual findings. In a study by Emslie and Hunt (2009), it was found that women and men identified problems in their paid work and other responsibilities differently: women with the juggling of their paid work with other responsibilities such as adult children and ageing parents, men, on the other hand, identifying their work–life balance as being problematic in the past when they had small children. The researchers concluded that the difficulties of work–life balance lasted longer and were more complex for women than for men (Emslie and Hunt 2009; Katila and Eriksson 2013). However, the gap between women and men in terms of the difficulties of work–life balance was found to be especially large among workers in their 40s (Harnois 2015).

The studies discussed previously demonstrate gendered differences due to ageing and the age-sensitive need for support in regard to work practices, leader support, and HRM. Overall, this aspect or gender difference is rarely raised as a topic in ageing research (Aaltio et al. 2014). While understanding that people throughout their lives are engaging in identity work as described by Alvesson and Due Billing (2013), this means that they aim to achieve a feeling of a rather coherent and positive sense of their self at all ages. Identity is shaped in situation-specific scenes and in people's own stories about themselves, taking place between the personal and the social. Women and men participate in this identity work in the broader cultural and social context and in respect to power relations.

## Gender, Ageing, and Leadership

Early management research took it for granted that managers were men and ignored gender issues altogether. The great man theory, as one of the earliest management theories, is mostly adaptable for male characteristics and ignores women. It argues that those individuals who have influenced Western civilization have the characteristics that are needed to be a good leader. The transformational leadership prototype (discussed by Kent et al. 2010), part of any charismatic leadership with a strong, visionary, and change-agent type of leading style, fits better to male than to female stereotypes. Many of the traits cited as being important in order to be an effective leader are typically masculine traits (Hearn and Morgan 1990). In Peterson's (2014) study it was highlighted that women managers may become agents of change by challenging masculine management as a norm for organizational settings, where men have dominated management positions by their mere presence, and where they may adopt a different management style. In questions of leadership, the gendered self and identity work concerning it becomes relevant. While gaining managerial identity is also a question of age (Hill 2002), there are also differences between men and women in the issue of age and ageing. Ageing may bring experience and authority, but this is recognized differently based on gender.

The nature of ties between leaders and those who are led is also emotional, not just rational; the relationship is personalized and intimate and based on mutual trust. While leadership is based on interaction, subordinates need to sense the meanings and how to reach them in order to commit to the tasks and the organization (Weierter 2001; Campbell et al. 2008). Emotional ties trigger personified leadership and trust. There are expected differences between men and women in this aspect of leader–follower relations. This is especially true with strategic management key positions, as on the boards of large companies, where non-typical feminine stereotypes are emphasized. Masculine kinds of organizational practices, but also follower expectations, affect the fact that there are fewer female candidates who apply these positions. Therefore, career advancement and gaining the identity of manager also have a gendered background. Culturally based assumptions and definitions concerning both genders have an effect on the career choices of individuals. Leadership is also a field where individuals have to learn and develop, and gendered practices are found to be present even in management training such as master's degrees in business administration (MBAs), which in many studies have been found to prioritize stereotypically masculine kinds of competences rather than being gender neutral (Simpson 2006; Kelan and Dunkey Jones 2010).

In addition, Miller (2002) found in her empirical study that the gendered culture of the oil industry set up barriers to stop women entering managerial positions. She concluded that the most durable barriers to women exist in this gendered culture with masculinism, a macho kind of cowboy hero, individualism, and paternalism, which exclude women from power networks. The only way for women to thrive in this industry was to assimilate and adopt the prevailing culture.

The legitimacy of leadership and also charismatic leadership is sociologically and psychologically attributed to the belief of the followers. Leaders are important because they can "charismatically" evoke this sense of belief and thereby demand obedience. As in leadership generally, charismatic leadership is created and legitimized in the ongoing processes between leaders and followers, and is even a “gift” given by the followers (Kempster and Parry 2013), whereas it was earlier seen as a gift from “God” (Potts 2009). Even if nowadays it is understood that charisma can also be developed and trained, its personal nature still exists.

Gender is related to culturally based norms and values, instead of just being a feature of an individual. Cultural meanings create the gendered context for leaders that both women and men can use in their leadership. Feminine and masculine ideals have an effect on the recognition of a good or bad leader. Feminine ideals challenge the power relations and the implicit gender order, which relate to the institutional and social arrangements. For instance, the breadwinner model assumes that the man is the primary earner in the family and the woman is secondary. The ideals about what it means to be a “real woman” is still near to the caretaker role (Wood 2008; Gartrell 2007). Women who advance in their managerial career, especially in sectors that are largely occupied by men, are at the same time renewing social practices and reproducing gender relations, whether they are aiming to do this or not. This needs identity work on their part, based on both gender and age.

## Myth, Films, and Identification

Myths are connected to human fate and history. The nature of myths and mythology, as discussed by Kostera (2008), is neither good nor bad. Moreover, in national epics, myths are usually recounted ancient stories about gods and their deeds, and about heroes who make history. Because myths go beyond factual history, they present underlying structures of human culture, both collective and temporal. Myths usually search for meanings and embrace the ontological nature of the world by referring to the origins of the earth, birth, death, and transformation (Aaltio 2008). By presenting the great men, heroes and heroines, they also illustrate and establish norms and values beyond the stories (Gabriel 2004).

As stated, myths lead people to see the whole rather than just the sum of its parts (Bowles 1989), so their nature is holistic. They can also be experienced without straining for effect, and even without abstraction or moralizing (Cassier 1955; Frye 1990). Instead emotions and non-rational sensual experiencing become important. Epic characters describe the reality beyond the myth and give the readers some structure on which to base their thinking, so they are especially meaningful in understanding the myths. Ancient mythologies often tell stories about male heroes and battles, but there are also female characters who are not only supportive heroines but also at the center of the myth. While Gherardi (1995) studied organizational stories and myths, she made an association between female leaders and certain archetypes found in ancient Greek mythology. The Finnish Kalevala mythology also has some powerful female characters, such as the mistress of the North, Louhi, who is a leader and manager figure (Kalevala 1999; Aaltio 2008). The mythology in Kalevala has inspired art and literature, and also Tolkien's stories behind *The Lord of the Rings*.

Even if organizations are not black or white, rational or unrational, it is said that myths relate rather to the unmanaged organization with emotionality and fantasy (Hochschild 2012; Kostera 2008). While contemporary life is demythologized to a high degree compared with previous eras, myths still live on in the culture and in art forms such as contemporary films. Myths are potentially relevant for all kinds of cultures, such as businesses and organizations, so they are not just history; indeed there is a kind of "organisational mythmaking" according to Kostera (2008, 4). As discussed by Gabriel (2004, 2008) and Bowles (1993), mythologies and old stories in general are alive in the contemporary world and can be retold and reinterpreted in ways that give new light about how organizations work nowadays. The essence of storytelling is human and it is widely shared; it is not only invented and marginal fantasy.

Storytelling is part of everyday life practices. By repeating stories to others a collective memory is built up and retained as cultural myths and sagas, or in contemporary times, as history, novels, films, and other poetic forms (Aaltio and Hiillos 2002; Hatch et al. 2005). Films are based on stories that have collective and unconscious subtexts, and therefore they invite audiences who share the ideals or at least can identify with the stories and myths. Film manuscripts often originate from historical tradition or myth. Overall, films and literature in addition to being amusing present much about work life and organizations of today (Page 2012). Even if seemingly rational, organizations are far from story-free spaces, argues Boje (1991).

Narratives of great achievements, of missions successfully accomplished, crises that were successfully overcome, heroism of leaders and managers, for instance, are all present in ordinary organizational life (Gabriel 2004). While people also tend to view their own life as a story, they can get material through other stories, myths, and films for their identity work.

One reason for the increase in research into aesthetics may be that it has the power to stimulate research and scholars (Warren 2008). Organizational aesthetics is an approach that "urges scholars to pay attention to so-called 'non-rational' elements of organisational life in order to explore what has traditionally been hidden in mainstream organisation and management studies" (Warren 2008, 559). Strati (1992) has stated that organizations contain knowledge that is not entirely verbal, or entirely sayable, ending with the statement that other languages can therefore intervene, be they visual or gestural, intuitive or evocative. Researching this unmanaged organization needs different tools and materials.

The linguistic turn in the social sciences makes way for various forms of narrative fiction, such as films, as a legitimate basis for the study of management and organization (Czarniawska 1999). Films, as organizations, can be seen as texts that serve as valuable sources for organizational analysis (Foreman and Thatchenkery 1996). There are texts but also subtexts that can be read for interpretation. Films are a mechanism of mass popular culture, and can express contemporary ideals and practices to a large number of people (Czarniawska and Rhodes 2006). Films can open up explorations of how the subjects of management and organization are represented and understood both emotionally and intellectually (Bell 2008). They produce systems of discourse, which can help in shaping the collective perceptions of management and organizing. There are also competing discourses in films that can be detected, and the critical analysis of a film can highlight questions of inequality, control, and power, also within managerial discourses. Understanding why one film is popular can reveal relevant experiences of work, power, and organizing (Bell 2008).

Having this possibility of identification in mind, I became curious about studying the film trilogy *The Lord of the Rings*, based on J.R.R. Tolkien's three mythological novels and directed by Peter Jackson. The story is about heroes, elves, and the fight between good and bad forces, magic and immortality. The characters in the films are quite homogeneous in terms of age. Young or young middle-aged men present the majority of the central plot of the films, with the exception of three very old male characters and a few female figures. While films nowadays have a lot of impact on the cultural subconscious, they also need critical reading. As storytelling and films are part of everyday life, and as this trilogy is one of the most powerful of our times, it also deserves critical analysis.

In a study by Barker (2005) concerning films, the issue that the audience identifies with the characters of the films was raised. Audiences may take part in the story to a depth where they become open to the values and messages it contains. This makes them vulnerable. Barker also (2005) studied *The Lord of the Rings* in order to find out which characters the audiences chose as their favorites and why, ultimately ending up with nine favorites: Aragorn, Éowyn, Frodo, Gandalf, Gimli, Gollum, Legolas, Pippin, and Sam. It is remarkable that among these types, only one woman character, Éowyn, was chosen as a favorite even though there are several female characters in the films that are also central in terms of Tolkien's fiction. Barker (2005) studied the relationships of the characters and the identification with them among the audiences by age. His work shows that the films were most popular among young audiences between 16 and 45 years: almost 75 % of the respondents were in this age range. The audience chose the young hobbits Pippin, Sam, and Frodo as the most popular, Legolas was the most popular of the elves, and Éowyn, the only female and also a young woman character, was most popular for the audience between 16 and 25 years. The old male wizard Gandalf and gnome king Gimli were also quite popular in all age groups. Having this study at the background of the analysis, the film trilogy itself is approached now.

## The Films and the Characters in *The Lord of the Rings*

### The Films, Research Questions and Analysis

In short, the story of *The Lord of the Rings* is about a journey made by a group consisting of a wizard, four hobbits, an elf prince, and a gnome king, together with two ordinary mortal individuals, who roam through adventures and dangers to destroy the powerful, special Ring in the evil mountains of Mordor. This Ring has power no one can resist, and therefore it needs to be destroyed because of its ruinous impact on an individual that possesses it. The first film starts thousands of years before the events of the novel, and is then mainly about the struggle between the forces of good and evil using impressive technology for fabulous figures. The films have won several prizes. The trilogy by J.R.R. Tolkien, and the films, have inspired much artwork, music, films and television programs, and video games, and their cultural impact is remarkable worldwide.

The specific aims of this analysis are:

- to study the films' characters in terms of age, leadership and gender;
- to study the Grand Narrative concerning age in the films—what it tells us about age and ageing;
- to study the invisibility of women and especially older women in the films.

## The Main Fictional Characters in the Films

The characters of the films studied here are representatives of the (very) old, young, women and men. The old characters presented here are Gandalf (male), Bilbo (male), and Galadriel (female). The young characters are Frodo (male), Aragorn (male, middle-aged/young), Éowyn (female), and Arwen (female).

*Gandalf*: In the story plot this old male wizard is a leader who has exceptional magical powers. He knows the history of the Ring and shares the plan with the others about how to destroy it. He is respected as a leader of the group and gives hope to the others and helps them unselfishly. He is a magical combination of a charismatic human and a superhuman. The figure of the wizard is central to the story, or the story is "accomplished with him; the audience saw him as a leader, father to the others, wise, kind and benevolent" (Barker 2005, 370). His character was admired in all age groups, and older men (Barker 2005) especially chose him as a favorite character. Central in the story is his transformation from "Gandalf the grey" to "Gandalf the white" after a battle with the evil forces, where everyone expected him to be destroyed. In terms of age and ageing, Gandalf represents an old male character for whom age has brought wisdom and unselfishness. He is especially a good friend with another old male figure, Bilbo, but also with other young male members of the group.

*Galadriel*: It could be said that she is the most famous and powerful elf in the story. As described, she is tall, grave, and beautiful, and also appears very gentle, firm, and wise. She is described as having been blessed with the ability to peer into the minds of others and then judge them fairly, so she displays a kind of telepathy. Galadriel plays no important role in the battles but stays separate. She is aware of the forces of the Ring that can turn destructive, and she does not strive for it because of its black magic. In this, she is able to reflect herself. Even though she has a central role in the books by Tolkien, she is a side figure in the movie. She was not named among the nine favorites in the films. She is often presented with her husband, like a queen with a king. She is old and powerful, but invisible and stable, and is not part of the journeying group.

*Bilbo*: He is the old hobbit, older than a human can age, and a good friend of another old man, Gandalf. He used to own the Ring but gave it to Frodo. Because of the magic power of the Ring this is a relief to him—he sort of retires after giving up the task of preserving it with its magical power. He was not named among the nine most favorites in the films, but he is central to the story plot.

*Aragorn*: He is a young or middle-aged human male character. He leads the army of Gondor and Rohan against the Black Gate of Mordor to distract Sauron's attention so that the hobbits Frodo and Samwise can have a chance to destroy the Ring. In the end, he marries Elrond's daughter, Arwen. In Barker's (2005) study, he was described by the audience as "a true leader, masterful, shows integrity, humility and resilience, who displays clear morality and assumes his destiny." In addition, he was quite gender and age-neutral as a favorite character, being the favorite for a range of different people among the audience.

*Frodo*: He is central to the films, being a hobbit, smaller than adult men, and very young or even child-like, and it is he who must destroy the Ring by the fire. His appeal is a combination of bravery and caring. The audience that chose him as a favorite were especially older women (Barker 2005, 369–370). He is a leader figure for hobbits but does not really show leadership capacity. He is brave and finally fulfills the task of destroying the Ring.

*Éowyn*: She is a noblewoman who is described as a shieldmaiden, a leader character, and warrior. She loses her brother and father in a battle, and participates in the final fight disguised as a man. She confronts the Witch-king, after her father, King Théoden, is injured. In Barker's (2005) study, she was the favorite of young 16–25-year-old women. She is described as "selfless and strong in heart, she shows courage and determination and overcomes personal pain and heartache." According to the tale, no living man may hinder the Witch-king, but Éowyn says: "But no living man am I – you look upon a woman." Éowyn was the only female character of nine named as favorites in the films, and can even be seen as a representative of all women, who have to fight for their place (Barker 2005, 369). Éowyn is not lucky in her partnerships, however, but stays alone—losing her father and not being able to associate with young men even if she seems to fall in love with Aragorn.

*Arwen*: She is a minor character in the films, but serves as inspiration and motivation for Aragorn, who must become king of both Arnor and Gondor before Elrond, her father, will allow him to marry her. Arwen receives a vision about their son and decides to become human instead of remaining an elf. Arwen makes her life choices emotionally, according to her "heart": she leaves the elf life and becomes mortal in her desire to hold her own son with Aragorn. She therefore ends up with a very traditional female life choice. However, being a heroine although not central to the plot, she was not named among the nine most attractive characters. Her presence becomes important for Aragorn, giving even more glory to him. So her role is a heroine role, making the hero even more important and giving him even more reason to fight.

One figure that is important throughout the story is Gollum, who is both human and animal-like. It or he becomes a wreck, is ruined by his lust for the Ring and his desire to be free of it. Earlier Sméagol, now named Gollum, was corrupted by the Ring. He shows the ruining potential of power in his pitiful outlook. In a way, he is the opposite of Bilbo or Gandalf. He loses the Ring but never overcomes its ruinous power. In terms of ageing, he shows the potential for ruin, whereas the other old male figures show constructive transformation and firmness. This creature was also named as one of the most favorable owing to the amusement and enjoyment he provides.

## Findings

The Tolkien's trilogy characters have sometimes been criticized as being dichotomously black or white, good or bad; but some of the "good" characters have darker sides that feature in the story, and likewise some of the villains have "good impulses" (Hammond and Scull 2005). The characters in terms of gender stereotypes and age can also be shown to have exceptions, such as the iconic transformation of Éowyn. Central to the films, though, is its central theme about men's friendship and companionship. Women are sometimes rebels amongst themselves, being in love with the same man, and no true friendship is shown between them. The female characters of the films, except Éowyn, are more passive in terms of the central plot of the films, and do not present strong identification models. The older women are seldom shown in the films, sometimes among the hobbits but without any role, name, or character. Galadriel is the only old and powerful female character, also telepathic and magical. She, however, does not take part in the noble fights but remains stable and outside the central actions. She is mostly described with her husband, and her charisma is not seemingly related to any human followers. She is a lonely albeit impressive figure in the story, and as mentioned is not nominated by the audience among the most remarkable nine figures in the story (Barker 2005). What is notable is that she does not transform; either positive transformation or negative ruin is therefore not possible. Her power is in being reflective in her thinking, wise, but as seen her role remains minor. In a way she is marginalized in the films, just as often happens to older women in organizations, referred to in the studies by Irni (2009) and Ainsworth (2002).

The major forces of transformation due to ageing look to relate to the male character Gandalf, but also Bilbo. The wizard Gandalf presents no clues in relation to female companions or private life. His closest friend is the old hobbit Bilbo with whom he speaks as an equal. He appears almost like a monk in outlook. He gets the idea and vision to destroy the Ring. Gandalf has grown very old because of his magical powers, so he even fights against time. He is able to transform totally—his transformation after fighting evil forces makes him into Gandalf the White rather than Gandalf the Grey. He is admired by his friend followers, who respect him, but he also looks to be close to them emotionally. The story is about a turning point in history, so this is a place for a charismatic, change-orientated leader to appear. Bilbo chooses another route. He is able to leave the magical Ring to Frodo, to resist its power, and he ends up living a happy ordinary life as a retired elderly person.

The young Éowyn, by comparison, definitely has leadership power because she ultimately leads the soldiers towards the enemy orcs, representing the evil forces. However, the parts where she is seen in the films are short in comparison to the other parts of the battles. She does not talk much herself but smiles and remains pleasant and mild most of the time. So her transformation is almost surprising and sudden, without a long transformation. Her winning in the battle even looks to be accidental. All the scenes in the center of the films are about her relationship with male others. There is an iconic moment (Barker 2005), however, that makes her into a female hero of the story: she kills the Witch-king, whom no man could kill, while dressed as a man. She breaks the magic. In the films she fails to raise Aragorn's interest and remains a loner. Éowyn is not part of the male friend networks, nor does she have female friends. She even has to win with her femaleness and her longing for relationship in order to become a successful leader. She looks to gain her success at the emotional cost of her private life (as in the duality of female careers discussed by Aaltio and Huang 2007).

As a young woman Arwen is also seen more in relation to men, falling in love with Aragorn and being loyal to him, and seeing in a dream a vision of their son, which causes her to make the choice to become "human," mortal, instead of an elf. Women in the story mostly appear as relational, be it with their father, brother, admired man, or husband. This is in line with women's psychological development theory that emphasizes the importance and centrality of relationships in women's lives (Gilligan 1982), but in which image can be a barrier to career development.

In the film trilogy, the visible and sensed masculine and feminine are in sharp contrast. The women's voice is specifically minor; there is not much time given to it. For instance, in the central meeting in the films, where the battle is planned by the group of fighters, there was a group of men sitting but no female figure or voice; in fact only a statue of a woman stands in the foreground of the scene. The sensual, both auditory and visible, messages in the films are like a subtext, which supports the plot, and sharp stereotypes of the masculine and feminine remain.

In the story Frodo and Bilbo present young and old characters; the power and responsibility of the Ring is given from an older man to a young man. The organization itself is often mythologized as immortal (Kostera 2008). Participating humans can join the immortality, to reach the boundaries of time for the future. The tasks of the organization are bigger than any single human, and this drives men to glorious deeds. Ageing can also be explored in the fate of Gollum. He is a male figure, a kind of result of non-respectable behavior in the course of ageing, being captured by his greed and weakness. Sometimes old people can be referred to as described by Tulle-Winton: "an aging body can even be like a 'cultural icon of decline and helplessness'" (1999, p. 297). So Gollum shows ruin, the negative transformation, what greed can do for a human and, more specifically, for a male human. However, he raised sympathy and mercy among the audience.

The trilogy separates the private home and the public battle sharply, without much possibility for combining them. It tells us about the meaning of good companionship, brotherhood and care, and moreover the trust that is needed between people in order to succeed. Female characters are related to family ties and the caring aspect more than the men. The gendered separation between female and male charisma is evident in the story, and it also presents the aged self for the purposes of the story. The variety of generations in the story is limited; there are old figures, young (or early middle-aged) men, and young women (with the one exception of Galadriel). The elves do not age at all but stay young and immortal. So the typical myth-like characteristics appear in the film story.

## Conclusions and Discussion

The films are a condensed version of the trilogy written by J.R.R. Tolkien, and there are also some differences in Peter Jackson's adaptation. The characters of Tolkien's mythology have sometimes been criticized as being dichotomously black or white, good or bad; however, some of the "good" characters have darker sides that feature in the story, and likewise some of the villains have "good impulses" (Hammond and Scull 2005). The characters representing age and gender as well as their juxtaposition show similarities in line with earlier knowledge about ageing and gender. This film analysis shows the potential of myths in understanding our ordinary life and work in organizations. Even if the films are about magic and magical characters, their essence is easily understood in terms of the life of contemporary organizations, with female and male roles, leadership, and charisma. The basic beliefs and values presented by the films could be seen as being in line with Edgar Schein's model of organizational culture (2010), with the hard or deep core of culture that does not change easily, containing self-certainties about life, time, and human beings.

The sensual experiences and aesthetics of the pictures, voices, and other auditory material could be further studied. While audiences of films are not only spectators (Barker 2005), but also identify with the stories and characters, the films in addition to being amusing also serve for identification and role models for the future. The films please audiences, which are more often young than old. Young women often identify with the young female characters. Likewise, young men might not connect as easily with the older male characters but with the young men. At the same time, ideals about ethics, behavior, war, and peace are represented. Films are based on and also create a shared collective consciousness, which is also generation specific.

As *The Lord of the Rings*" is based on mythology and is carried out impressively, it can be a "lived experience" for the audience. In particular, the sensual material, which is both artistic and technologically advanced, makes Peter Jackson's guided film trilogy culturally powerful. While films work at the level of aesthetic experiences, this side of contemporary stories, storytelling, and films represent a kind of subtext in organizational story-making and should be studied further.

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# Section 3

## Age as Career

# 5

# Late Career and Retirement in the Context of Changing Careers

Hanna Salminen and Monika von Bonsdorff

## Introduction

An ageing population is currently a major global trend (Hennekam 2015). In many industrialized countries, different reforms have increased the retirement age in order to minimize the cost of early retirement and to prevent an expected labor shortage (Hennekam and Herrbach 2015). Phased retirement, abolishing mandatory retirement, enhancing employability, and providing financial incentives have been used as ways to increase labor market participation among older individuals (Baruch et al. 2014; Sonnet et al. 2014). According to the recent OECD report,

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Pensions at a Glance 2015, the official retirement age has increased in many countries. Although many older employees still retire before the official retirement age, there is a trend for a growing retirement age. As noted in the report, the employment rate of older employees (55+) has increased during the last ten years (Pensions at Glance 2015, 9).

Societal policies and efforts to prolong work life may contrast with the realities that older employees encounter in the workplace during their late career. Owing to global pressures, today's organizations are forced to search for cost reductions and flexibility, which can negatively influence individual careers (Tempest and Coupland 2016, 3–4). Financial crises, especially downsizing, job insecurity, and job losses, influence the current nature of careers (Baruch et al. 2015, 4) and how common working beyond official retirement age will be in the future (Sargent et al. 2011).

In addition to societal- and organizational-level issues (Shultz and Wang 2011), there are also individual factors, such as lifespan goals, that can influence older employees' expectations of their later career and retirement. For example, remarriage can influence late career and retirement choices (Bown-Wilson and Parry 2013, 317). Furthermore, older employees' late career experiences can vary based on factors such as gender, social class, health, or ethnicity (Phillipson 2014, 238). In studies related to ageing employees, the threshold for defining "ageing" or "older" has varied, usually from 45 to 55 (Kooij et al. 2008, 365). This criterion age has been justified by decreasing workability (Ilmarinen 2006, 42) and labor market participation (Brough et al. 2011, 107), and the possible changes in career aspirations (Buyens et al. 2009, 106). However, older employees are not a homogeneous group because of differing changes in physiological, psychological and social functioning due to ageing (Kooij et al. 2008, Ilmarinen 2006).

There is no universal definition or measurement of retirement (Beehr and Bennett 2015, 113). Wang and Shi (2014, 211) have defined the concept of retirement as "an individual's exit from the workforce, which accompanies decreased psychological commitment to and behavioral withdrawal from work." Since the nature of retirement is becoming more complex, continued working after retirement, so-called bridge employment, can take many forms (Beehr and Bennet 2015; Hofstetter and Cohen 2014). Broadly defined, bridge employment, as noted by Beehr and

Bennett (2015, 113), refers to "any paid work after retirement." This definition covers all kinds of paid work, from a career job to self-employment and from full-time to part-time work (Beehr and Bennett 2015, 113).

Retirement research is multi-disciplinary, including disciplines such as gerontology, political science, economics, sociology, and psychology (Shultz and Wang 2011, 170; Beehr and Bennett 2015, 113). In psychologically oriented retirement research, retirement has been usually conceptualized as a decision-making process, an adjustment process, and a career development stage. Each of these conceptualizations provides a different research focus (Shultz and Wang 2011; Wang and Shi 2014; Wang and Shultz 2010). In this chapter, a career perspective has been taken in order to understand ageing employees' late career and retirement intentions in the context of changing careers. The career perspective is relevant because careers are becoming more diverse and complex, and they can be expected to influence older employees' retirement patterns as well. Furthermore, today's older employees began their working life when careers were considered more traditional, "organizational" careers; therefore, it makes sense to investigate how the changing nature of careers may influence their late career and retirement decisions (De Vos and Segers 2013). Integrating research into the changing nature of careers and retirement can also provide new insights into how to retain older employees in an organization.

## From Traditional to New Career Models

The definitions of career have evolved owing to the changing nature of careers. Sullivan and Baruch (2009, 1543) define career as "an individual's work-related and other relevant experiences, both inside and outside organizations, that form a unique pattern over the individual's life span." This definition echoes new career models that capture career movements, meaningful events, and career outcomes inside and outside organizational boundaries (Sullivan and Baruch 2009, 1543). In traditional career models, career movements mainly concerned hierarchical movements inside organizational boundaries (Clarke 2013, 685). In traditional career models (such as Hall 1976; Super 1980; Dalton and Thompson 1986), careers were seen as evolving according to career stages. In addition, individuals' values and psychological tasks differed according to those stages (Post et al. 2013, 89). For example, Super (1957) distinguished four stages: establishment, advancement, maintenance, and decline. Dalton and Thompson (1986) identified the following stages: apprentice, colleague, mentor, and sponsor (see Post et al. 2013). In these models, retirement is portrayed as a final withdrawal and detachment from work (Sargent et al. 2011).

Traditional career models have emphasized job security and objective career success over subjective career success (Clarke 2013, 685). Objective career success relates to extrinsic issues, such as salary and position, whereas subjective career success stresses an individual's subjective experiences, such as opportunities for learning and development and a work–life balance (Hennekam 2015, 1116). Older employees who are not able to achieve career success during the late career stage can experience plateauing. Two forms of career plateauing have been distinguished in the literature: hierarchical and job-content plateauing. The former refers to a situation where there are no possibilities for vertical advancement, whereas the latter describes a situation where the current job no longer provides challenges (Armstrong-Stassen 2008, 595). A plateaued work situation can increase early retirement intentions (Hofstetter and Cohen 2014). A distinction can be also made between objective and subjective career plateauing. The former refers to an employer's controlled actions, whereas the latter concerns an employee's subjective judgment (Bown-Wilson and Parry 2013, 310). However, challenging and meaningful work can decrease experiences of career plateau (Armstrong-Stassen 2008, 598). For example, as Kooij et al. (2008) concluded, based on their comprehensive literature review, organizational tenure can have both negative and positive effects on older employees' motivation to continue working. Organizational tenure can enhance feelings of career plateau and increase skills obsolescence, which are likely to negatively affect older employees' willingness to continue working. However, organizational tenure can be positively related to older employees' work commitment and career resilience, promoting older employees' willingness to continuing working (Kooij et al. 2008, 383).

In contrast to traditional career models, contemporary career models propose that individuals can undergo different career stages several times during their career (Post et al. 2013, 90). For example, Shultz and Wang (2011, 171) have argued that a "second career" has become more common for many middle-aged employees, not only for those working in professional sports or the military, for example. Despite the rise of new career models, there is little empirical evidence concerning how common these models are in the current working life (Greenhaus et al. 2008; Clarke 2013; Baruch et al. 2015). Furthermore, older employees have received rather limited attention in studies concerning new career models (De Vos and Segers 2013).

In this chapter, we will provide a selective review of studies that focus on older employees' late career and retirement intentions in the context of new career models. For this literature review, recently published peer-reviewed journal articles (from 2011 to 2016) were selected based on criteria that were related to this topic. These studies give insight into the possibilities and constraints that older employees may encounter during the late stage of their career owing to the changing nature of careers. Table 5.1 summarizes the studies by author(s), topic, career perspective, method(s), and key findings.

The studies presented in the above table provide an example of how the changing nature of careers and older employees' later career and retirement have been approached. These studies vary in terms of their research focus, definition of older employees, methodology, and career perspective. Four different career models were applied in the studies: boundaryless, protean, intellectual, and kaleidoscope. Some of the studies integrated various career perspectives. These career models are discussed along with the selected studies.

## Mobility or Embeddedness?

The changing nature of working life in terms of globalization, job insecurity, and technological advancements affects employees' careers today, regardless of their age (Tempest and Coupland 2016). In opposition to the traditional, organizational career, boundaryless career is seen as individually driven and mobile (Arthur 1994; Sullivan and Baruch 2009). For example, DeFillippi and Arthur (1996, 116) have

**Table 5.1** Examples of studies related to changing careers and retirement

| Author(s) | Topic | Career perspective | Method(s) | Key findings |
|---|---|---|---|---|
| Lyons et al. (2015) | Changing career patterns of four generations | Career mobility | Quantitative study | Younger generations were more mobile than older generations |
| Biemann et al. (2012) | Career patterns among a representative sample of German employees | Career mobility | Longitudinal panel study | Different socio-demographic factors indicated traditional and non-traditional career paths |
| Bamberger and Bacharach (2014) | Work-related antecedents of retirement upon eligibility | Embeddedness | Quantitative prospective study | Fit, sacrifice, and links had influence on older employees' intentions to work beyond retirement age |
| De Vos and Segers (2013) | The relationship between self-directed career attitude and retirement intention among older (45+) employees | Protean career model | Quantitative study | A high self-directed career attitude was linked to intentions to retire later, and this relationship was mediated by engagement and career self-management behavior |
| Wöhrmann et al. (2016) | The relationship between work values and different forms of post-retirement work intentions among older (45+) employees | Protean career model | Quantitative study | Significant relationships were found between different work values and intentions to work after retirement |

(*continued*)

**Table 5.1** (continued)

| Author(s) | Topic | Career perspective | Method(s) | Key findings |
|---|---|---|---|---|
| Zacher and Griffin (2015) | The relationship between career adaptability and job satisfaction among older (54+) employees and the moderating role of age and motivation to continue working | Career adaptability | Longitudinal quantitative study | Career adaptability was positively related to job satisfaction and this relationship was moderated by age, but not by intentions to continue working |
| Hennekam (2015) | The influence of social skills and continuous learning ability on older (50+) employees' career success and career satisfaction | Career capital, boundaryless career | Mixed methods study | Competencies were positively related to career satisfaction and career success, but continuous learning was also perceived as demanding |
| Tempest and Coupland (2016) | Older employees' career capital in the context of global economy | Intelligent career, career capital | Conceptual analysis | A distinction was made between "high" and "low" career capital to exemplify the polarization of older employees. The study identified temporal and spatial challenges that older employees may face during their late career |

(*continued*)

**Table 5.1** (continued)

| Author(s) | Topic | Career perspective | Method(s) | Key findings |
|---|---|---|---|---|
| August (2011) | Older women's late career development | Kaleidoscope career model: the importance of authenticity, balance and challenge | Longitudinal qualitative study | All three parameters of the kaleidoscope career model were relevant for older women |
| Bown-Wilson and Parry (2013) | The motivation for career progression among older (50+) managers | Career motivation | Qualitative study | Motivational drivers were related to career and life goals<br>Subjective career drivers were more important than objective career drivers |

defined boundaryless career as "one of independence from, rather than dependence on, traditional organizational career arrangements," including "opportunities that go beyond any single employer" (Sullivan and Baruch 2009, 1551). In other words, mobility beyond organizational boundaries is the central characteristic of the boundaryless career model. However, physical mobility can also refer to changes in one's job or occupation. Furthermore, mobility can mean different kinds of movements in an individual career, such as upward or downward progression (Inkson et al. 2012; Lyons et al. 2015). Psychological mobility refers to new ways of thinking about one's career and the ability to make career movements (Sullivan and Baruch 2009; Arnold et al. 2010), and it can also be understood as an ability to make career decisions that are in balance with the family situation, for example (Greenhaus et al. 2008).

There are several career choices which ageing employees can make during their late career, and mobility is one of them. However, only a few studies have investigated mobility patterns of older employees. Lyons et al. (2015) provided evidence of growing physical mobility among four generations of Canadian managers and professionals: Matures, Boomers, Xers, and Millennials. Their study demonstrated that both job and organizational mobility had increased among all generations, but the younger generations were more mobile than the older ones (Lyons et al. 2015). Furthermore, a 20-year panel study among a representative sample of German employees investigated how socio-demographic variables, such as age, gender, education, and family status, indicated different career patterns (Biemann et al. 2012). The results demonstrated that the change from traditional to mobile career patterns was more common among women than men. Owing to family responsibilities women were more likely to work part time or have non-standard employment than men. Furthermore, although younger employees were more likely to change employers, older employees were more likely to engage in self-employment. In older employees, a shift to self-employment before retirement could be the result of their greater financial and career capital compared with younger ones (Biemann et al. 2012, 168). However, it could also be that older employees pursue self-employment if their employers are unable to provide new career challenges.

There are also scholars (Ng and Feldman 2007; Inkson et al. 2012) who have advocated looking at the other side of mobility—embeddedness. The concept of embeddedness has been used to explain older employees' intentions to continue working. The embeddedness perspective highlights the individual, occupational, and organizational factors that tie employees to their current employment even though there are other job options available. More specifically, a distinction has been made between job, career, and organizational embeddedness. The key dimensions of embeddedness are fit, links, and sacrifice. Fit describes the compatibility between an employee's abilities and his or her job, occupation, or organizational requirements. Links are related to connections with other people in a particular job, occupation, or organization. Sacrifice concerns the cost of leaving a job, occupation, or organization. Furthermore, different work and non-work roles vary during individual careers influencing embeddedness (Ng and Feldman 2007). Based on the embeddedness perspective, Bamberger and Bacharach (2014) examined the influence of job and organizational embeddedness on older employees' retirement. Their quantitative study demonstrated that challenging work, close ties with co-workers, and perceived organizational support were positively related to older employees' intentions to continue working beyond retirement age (Bamberger and Bacharach 2014). Although the embeddedness approach has received little attention in retirement studies, it can provide a broader perspective for researchers who investigate the changing nature of the late career stage and retirement. Furthermore, the embeddedness perspective can act as a counterforce to the mobility perspective, which dominates the theoretical discussions of boundaryless careers.

## Protean Career Orientation

Retirement has become more dynamic in recent times (Wang and Shi 2014). This means that older employees are moving in and out of retirement, work organizations, and jobs. While the boundaryless career model emphasizes mobility, the protean career orientation stresses self-directness and value-driven career decisions made by individuals. It has been suggested that the protean career orientation illustrates more of an attitude toward a career rather than a specific career model (Greenhaus et al. 2008, 282–283). Hall (2004, 4) has described a protean career as "one in which the person, not the organization, is in charge, the core values are freedom and growth, and the main success criteria are subjective (psychological success) vs. objective (position, salary)." According to Hall (2004), the two "meta-competencies" required in a protean career are adaptability and self-awareness or self-directedness. It is expected that individuals who score high in both competencies are able to develop their competencies in order to follow their own career path (Hall 2004). For example, Wang and Shi (2014, 213) have argued that the protean career model is in line with the new way of understanding retirement as a "late-career development stage" that can provide opportunities for growth and new career directions.

De Vos and Segers (2013) focused on self-directedness in their quantitative study and its relation to retirement intentions among older (45+) employees. Self-directedness describes employees' abilities to take charge of their career development and adapt to learning demands, for example (De Vos and Seers 2013). In their study, they proposed that a self-directed attitude will influence self-management behaviors and engagement, which will be positively related to employees' intentions to retire later. The results demonstrated that high career self-directedness was linked to intentions to retire later and that this relationship was mediated by self-management behaviors and engagement, indicating that employees who actively develop their careers and are highly engaged in their jobs are less likely to withdraw from it early (De Vos and Segers 2013).

The protean career theory was also applied in the study of Wöhrmann et al. (2016). They investigated older (45+) German employees' work values and their association with various forms of post-retirement work intentions; that is, paid work for the same employer or another employer, self-employment, or volunteer work. Four basic value dimensions were studied: self-enhancement, self-transcendence, conservation, and openness to change. Self-enhancement concerns achieving one's own goals; it was not related to any of the post-retirement work intentions. Self-transcendence, emphasizing social relationships and altruistic intentions, was positively associated with all forms of post-retirement working. In contrast, high conservation values were negatively related to intentions to work for another employer, to be self-employed, or work voluntarily after retirement. High openness to change was positively related to volunteer work and negatively to working for the same employer after retirement (Wöhrmann et al. 2016). The protean career theory highlights an individual's active role in constructing and managing his or her own career. The above-mentioned studies also provided evidence that older employees' late career and retirement intentions are influenced by individual attributes, such as abilities, attitudes, and values.

## Career Capital and Career Success

Some selected studies focused on career success during the late career stage and career capital. Career success can be understood and defined in different ways. The social reality in which we are living influences how we understand and define career success. In addition to objective measures of career success, such as pay and promotion, career success can be understood as also including subjective evaluations, such as feelings of satisfaction, for example (Dries 2011). As a concept, career capital refers to both tangible (such as competencies) and intangible assets (such as emotional intelligence) that an individual possess. Together these individual-level competences are seen as prerequisites for career success (Tempest and Coupland 2016, 6). Career capital relates to an intelligent career perspective. According to Arthur et al. (1995) an intelligent career is formed by knowing-whom, knowing-why, and knowing-how. Knowing-whom refers to networks and social relationships, whereas knowing-why is related to meaning and motivation that an employee perceives when doing his or her job. Knowing-how refers to knowledge and skills, in other words to the human capital of an individual (Tempest and Coupland 2016, 6).

Career adaptability can be considered as one component of human capital. It enables employees to maintain their person–environment fit. It has also been seen as a requisite for proactive career behavior and has been demonstrated to be related to both objective and subjective career success (Zacher and Griffin 2015). Zacher and Griffin (2015) examined the relationship between career adaptability and job satisfaction among older employees. They also tested the possible moderating effects of age and motivation to continue working. The results demonstrated that only age moderated the relationship between career adaptability and job satisfaction, indicating that career adaptability is more important for those older employees who have more years ahead before retirement. Furthermore, career adaptability was weakly and positively related to older employees' motivation to continue working (Zacher and Griffin 2015).

Drawing on career capital theory and the boundaryless career model, Hennekam (2015) focused on two competences, social skills and abilities for continuous learning, and investigated how they were related to older employees' career satisfaction and career success. She combined survey and interview data. In general, the study showed that social skills were positively related to career success and career satisfaction, which indicated intentions to continue working. The quantitative data demonstrated that abilities to develop one's competencies were positively related to feelings of career satisfaction and career success. However, the interview data illustrated that some older employees felt pressure for continuous development and perceived it as a burden, which increased their thoughts of early retirement (Hennekam 2015).

In their conceptual paper, Tempest and Coupland (2016) approached older employees' career success from the perspective of career capital and intelligent career. High career capital employees were seen to be those who had high levels of knowing-how, knowing-who, and knowing why, and were likely "winners" in the new career models because they were able to sustain their employability. In contrast, older employees with "low" career capital were more likely to experience career or job content plateau. Tempest and Coupland (2016) noted that an individual's career capital is accumulated during his or her career and is influenced by the possible inequities experienced during the course of this career. They also highlighted the "temporal" and "spatial" dimensions of career capital. The temporal dimension relates, for example, to the notion that the value of skills and knowledge is related to work demands that are likely to change during an individual's careers. The spatial dimension concerns the changing nature of "places" where work is done, such as mobile work and virtual networks, which are seen to influence older employees' late career (Tempest and Coupland 2016, 6, 17–19). In conclusion, it can be postulated that career capital can predict older employees' intentions to continue working until retirement or even beyond. While individuals accumulate their career capital during their career, the career capital can also diminish or lose its value owing to changes in working life. Therefore, the ability to maintain and develop one's own career capital is important regardless of age.

## Search for Balance

One of the central themes in the new career thinking is that individuals are trying to balance between work and non-work demands during their career. Women's career choices are seen to be influenced by different caregiving responsibilities and therefore their careers are often portrayed as more fragmented compared with men (Mainiero and Sullivan 2005). Some of the selected studies focused on late career development and career success with special reference to gender aspects (August 2011; Bown-Wilson and Parry 2013). For example, August (2011) investigated women's late career development and applied the Kaleidoscope Career Model (KCM) as a theoretical framework. The KCM suggests that individual career decisions are based on the importance of three parameters: authenticity, balance, and challenge. Authenticity relates to choices that individuals make based on their own values. Balance reflects efforts to find a balance between work and non-work demands. Challenges refers to expectations that individuals have towards their job and career. The significance of these parameters is expected to fluctuate during an individual's career owing to internal changes such as maturation, changing lifespan roles, or external changes such job loss and restructuring (Sullivan and Baruch 2009, 1557). For example, the study of Mainiero and Sullivan (2005) showed that even though women in their early career pursued challenges, they were also looking for balance and authenticity. During mid-career, the work–family balance dominated among women, whereas authenticity played a more important role during the late career stage of women (Mainiero and Sullivan 2005, 114–115; Cabrera 2009).

August's (2011) study showed that these three parameters of the KCM were evident in older women's late career and bridge employment experiences. In terms of challenge, the study demonstrated that the older women still searched for opportunities for growth. Searching for balance was perceived as easier at that time than during earlier career stages owing to decreased caregiving responsibilities. In regard to authenticity, the older women stressed taking good care of oneself. Those having a bridge employment also argued that they were reflecting end-of-life issues (August 2011, 228–229).

In the same way, the study of Bown-Wilson and Parry (2013) showed that the motivational drivers for career progression among older managers changed from extrinsic factors, such as pay and promotion, toward intrinsic factors such as autonomy, contribution, and work challenge. Furthermore, older female managers' motivational career drivers were related to issues that they had held back earlier in their career, such as self-realization and personal identity. Compared with older male managers, female managers' careers were more strongly influenced by family matters (Bown-Wilson and Parry 2013, 313, 316). In sum, these studies provide evidence that a search for balance between work and non-work demands and different caregiving responsibilities are likely to influence older employees' late career and retirement intentions. Furthermore, career aspirations may vary among older female and male employees based on their earlier career choices.

## Conclusion

The current turbulence of working life and the changing nature of work have altered the ways in which we understand careers. While traditional career models have provided a rather clear picture of the late career stage and transition to retirement, new career models are more open to diverse career paths. Owing to the changing nature of careers, the nature of retirement is also expected to change (Sargent et al. 2011; Shultz and Wang 2011). However, only a few studies have examined older employees' late career and retirement intentions in this context (August 2011;

De Vos and Segers 2013). The aim of this chapter was to examine this research area by conducting a selective literature review.

The key drivers for new career models are, arguably, the changing nature of work, but also individuals' desires to take more control over their own careers (Clarke 2013). These new career models are also seen as more suitable, for example, for women who typically have a more discontinuous career than men owing to caregiving responsibilities during early and late career (August 2011, 211). The common characteristics of the new career models are that they stress individual mobility, subjective career success, and proactive behavior in managing one's own career. Furthermore, continuous learning throughout the career is seen as a prerequisite to staying employable in the labor market (Zaleska and de Menezes 2007; Hennekam 2015). However, older employees are likely to differ in terms of what they wish from their late career (Hennekam 2015). Therefore, some older employees can feel demands for continuous learning as a threat that can lower their career satisfaction and increase pressure to retire early (Hennekam 2015, 1114).

Despite the new career models, such as a boundaryless career, there is also evidence that old career models can exist along with the new career thinking (Clarke 2013; Baruch et al. 2015, 14). However, this co-existence and its influences on older employees' late career and retirement choices could be studied more profoundly in the future. It has been argued that boundaries have not disappeared; rather, they have changed. For example, outsourcing, start-ups, temporary work, and consultation are likely to reshape careers (Tempest and Coupland 2016, 4). New career models are also likely to have negative effects, such as increasing job insecurity and problems related to work–family balance or "forced entrepreneurship" (Sullivan and Baruch 2009). In terms of mobility, those employees who have high professional expertise are more likely to succeed under the boundaryless career model (Tempest and Coupland 2016). Furthermore, employees can be reluctant to pursue mobility outside organizational boundaries (Zaleska and de Menezes 2007). The boundaryless career model has been criticized by not paying attention to the negative sides of the model. Researchers have also advocated examining the opposites of the boundaryless career model such as employee embeddedness (Ng and Feldman 2007) and career constraints (Inkson et al. 2012). For example, there is evidence that embeddedness can have a positive influence on older employees' intentions to continue working in their current job or organization (Bamberger and Bacharach 2014).

The changing nature of careers is also related to career success and career capital. Elements of subjective career success, such as autonomy, personal growth, and social relationships at work, can become more important during the late career stage than objective career success, such as pay or promotion (Bown-Wilson and Parry 2013, 317). The selected studies demonstrated different prerequisites for career success, such as career self-directness (De Vos and Segers 2013), career adaptability (Zacher and Griffin 2015), and career capital (Tempest and Coupland 2016). Those older employees having "high" career capital, including knowledge, skills, networks, and motivation to learn, are more likely to succeed during the late career stage than older employees with "low" career capital (Tempest and Coupland 2016). This assumption is supported by recent statistics that demonstrate that despite the recent economic recession, older employees' labor market participation has not dropped as in previous recessions. There is also evidence that more educated older employees continue working longer than less-educated ones (Sonnett et al. 2014). This indicates a polarization among older employees. Those older employees who have "high" career capital can flourish under the new realities of careers, but the new career models are likely to be challenging for those older employees with "low" career capital (Tempest and Coupland 2016, 5–6). Although career capital can accumulate during an individual's career, it can also diminish or become redundant owing to changes in working life. In particular, the new ways of doing work (see e.g. Tempest and Coupland 2016) can be demanding for older employees. Therefore, continuous learning and the ability to adjust are required throughout the career in current working lives.

## Implications for Human Resource Management

Owing to today's prolonged working life and the increasing number of older employees in the workforce, organizations need to pay more attention to the diverse needs and preferences of older employees in the context of the changing nature of careers (Bown-Wilson and Parry 2013; Hennekam 2015). The following implications for human resource management (HRM) can be presented based on the selective literature review.

First, while working after retirement in different forms has become more common nowadays (Shultz and Wang 2011; Armstrong-Stassen et al. 2012; Kojola and Moen 2016), motives for continuing working during old age are likely to vary. Therefore, individualized HRM practices and career options are needed to support the retention of older employees (Bown-Wilson and Parry 2013; Tempest and Coupland 2016; Bal et al. 2015; Cabrera 2009). Organizations should also recognize generational differences in their retention strategies (Lyons et al. 2015). For example, caring responsibilities, such as grandchildren or older parents, are likely to influence older employees' late career decisions (Tempest and Coupland 2016, 12–13). Women, in particular, may have demands for child and/or elder care during the late career stage (Shultz and Wang 2011, 176).

Opportunities to maintain and enhance career capital should also be provided during the late career stage (Tempest and Coupland 2016, 13). Older employees are likely to differ in terms of their attitudes toward continuous learning. Therefore, attention should be paid to finding the right fit between employees' competencies and job demands (Hennekam 2015). Career discussions and career counseling could be used in order to identify the needs and preferences of older employees and to promote their retention (De Vos and Segers 2013; Zacher and Griffin 2015). Strengthening a self-directed career attitude and career adaptability are also ways to retain older employees (Zacher and Griffin 2015). Special attention should be paid to individuals' subjective career success. New career directions, such as job enrichment and challenging work duties, should be considered as alternatives for traditional, hierarchical career progression (Bown-Wilson and Parry 2013). Furthermore, late career options should be in balance with individual work values (Wöhrmann et al. 2016). Providing an environment that fosters altruism is likely to promote older employees' intentions to continue working after retirement (Wöhrmann et al. 2016). Close ties with peers in the workplace are also important for the retention of older employees (Bamberger and Bacharach 2014). Moreover, wellness programs and flexible work options are examples of practices which can be used to support older employees' work–family balance (August 2011, 232).

## Suggestions for Future Research

Our aim was to provide a selective literature review of older employees' late career and retirement intentions in the context of the changing nature of careers. However, more systematic research is needed in order to examine the connections between new career models and older employees' retirement intentions. Although the extension of working life is evident, late career and retirement decisions are likely to vary based on legislation and pension reforms (see e.g. Bown-Wilson and Parry 2013). Therefore, more research is needed to investigate the changing nature of late career and retirement in different industries and sectors. Future studies could also pay attention to individual factors, such as gender, education, race, ethnicity, which are likely to influence late career and retirement in this context (see e.g. Wöhrmann et al. 2016). Given the increasing uncertainty that employees encounter nowadays, future studies could investigate the negative sides of new career models, such as job insecurity, forced mobility, or entrepreneurship during the late career stage (Baruch et al. 2015). Finally, there is also need for studies that integrate new career models in order to gain a broader perspective of the changing nature of the late career (see e.g. Sullivan and Baruch 2009).

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# 6

# Talent Management and Older Workers: Later Life Career Development

Suzanne L. Cook and Victoria Rougette

The Canadian workforce is ageing (Klassen 2013). This is an unprecedented shift as organizations, businesses, and broader society adapt to changing demographic realities. The emerging fields of later life career development and older worker talent management sit at the centre of the ageing workforce (Cook 2015, 2016). The ageing of the workforce increases the need for business and industry to examine the talent management of older workers while considering their career development needs (van Dalen et al. 2015; Cook 2016).

Career development is the vocational journey across life as individuals navigate the world of work and occupation (Baruch 2006). Career development is a lifelong process of managing education, learning, work and leisure transitions in order to move forward towards personal occupational objectives (Canadian Council for Career Development n.d.). Talent management refers to projecting the human capital required for

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an organization and the strategic workforce planning and policy to meet these needs (Christensen Hughes and Rog 2008; Al Ariss et al. 2014; Carpenter et al. 2014). Talent management co-ordinates and directs the different talents people have to offer within an organization (Christensen Hughes and Rog 2008; Carpenter et al. 2014). Everyone is unique and has different skills. Talent management is both a practice and a philosophy (Christensen Hughes and Rog 2008). Therefore, talent management is also an organizational culture where all employees are valued and viewed as an organizational advantage (Christensen Hughes and Rog 2008). Organizations want to recruit the people who can make contributions to the business (Ilmarinen 2012). Talent management involves assessing people's skills, abilities, talents, aptitudes, and credentials (Carpenter et al. 2014). Talent management includes attracting highly skilled workers, integrating new hires, and developing and retaining current workers to meet organizational and business objectives (Michaels et al. 2001).

Crowne et al. (2014) describe "older-worker-friendly" policies that accommodate the needs of older workers. Age management is another term used for the management of the ageing workforce (Fabisiak and Prokurat 2012; Cuitiene and Railaite 2015). The term talent management was chosen for this chapter because this particular term conveys how workers bring skills, strengths, and talents to organizations. Older workers are organizational assets and they require respect for the value they bring. This chapter examines talent management policy that is connected to the career development of older workers and is critical in the current intergenerational age, both for older adults and for organizations with an ageing workforce.

Older adults want to be active and engaged (Cook 2015). Furthermore, they expect to work longer and remain in the labor force past age 65 (Bélanger et al. 2016). A top issue facing businesses is the talent management of the ageing workforce (Pitt-Catsouphes and Matz-Costa 2009; Cuitiene and Railaite 2015;Beck and Williams 2016). Organizations require better ways to manage their talent in an ageing society (Pitt-Catsouphes and Matz-Costa 2009; Fabisiak and Prokurat 2012; Cuitaine and Railaite 2015).

This chapter examines talent management and career development for older workers within organizations using a critical lens. It describes the literature regarding talent management for organizations to adapt to the ageing workforce. Furthermore, this chapter explains how talent management can support the career development of older workers while at the same time shifting the discourse surrounding ageing and work. First, this chapter will define older workers. It will discuss later life work trends with recent Canada Labour Force Survey (LFS) data. Next, work and later life career are explored. Motivations for working longer will be explained. Facts about ageing, the benefits of older workers, and some disadvantages and challenges faced by them will be explored. Then, emerging organizational issues that are salient for the talent management of older workers and their career development will be examined. These include recruitment, retention, training and development, and career progression. Examples of organizational policy are outlined along with the experiences of older workers such as the barriers they face. The chapter concludes with a discussion of ways to change the discourse surrounding later life work and career development to encourage the labor force participation of older workers while also strengthening talent management in organizations. Finally, the theme of power as an older worker, both feeling empowered and the lack of power, is interwoven throughout this chapter.

## Older Workers

The term older worker has been variously defined in previous human resources, organizational studies, and ageing research. Some scholars define older workers as being 45 and above; others characterize older workers as age 50 and over (Williams van Rooij 2012; Bettache 2013). Some recent Statistics Canada reports refer to older workers as being age 55 and older (Carrière and Galarneau 2011; Statistics Canada 2011; Bernard 2012; Bélanger et al. 2016). In this chapter, we define older workers as individuals age 55 and older.

## Employment Trends Among Older Workers and Career Development

The workforce is ageing. According to Statistics Canada, the median age is now 40.6 years in Canada (see Table 6.1). In addition, more people over age 55 are in the workforce than previously (Statistics Canada 2011). In 2011, workers aged 55 and over represented 18.7 % of total employment compared with 15.5 % in 2006. Almost one in five workers is an older worker. This is due to two factors: the ageing of the baby boomer generation and the increase in labor force participation among older workers. Many other G8 countries also have an ageing workforce (Tokuda and Hinohara 2008; Wang and Shultz 2010).

While there was a trend towards "early retirement" in Canada during the early 1980s to the mid-1990s, employment rates among older adults have gone steadily and dramatically up since then, for both women and men (Carrière and Galarneau 2011). In Canada, labor force participation rates of men and women age 55–65 have risen since the 1990s (Bélanger et al. 2016). Today, older adults are extending their working lives and there are more older adults in the workforce than before.

In Canada and several other countries, governments have amended retirement policies by either increasing eligibility age or removing mandatory retirement (Schlosser et al. 2012; Klassen 2013; Lain 2016). This policy shift towards an extension of working lives means that people will be in the labor force longer, contributing to the economy and paying taxes (Buyens et al. 2009; Schlosser et al. 2012). At the same time, there is inequality among older workers, with poorer older adults at a

**Table 6.1** Labor force participation of individuals age 55 and older, 2012-2016 (in thousands, rounded to the nearest hundred)

| Age group | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|
| 55 years and over | 3209.5 | 3368.5 | 3490.6 | 3602.5 | 3748.7 |
| Median age (years) | 40.1 | 40.2 | 40.4 | 40.5 | 40.6 |

Source: CANSIM Table 282-0002 http://www5.statcan.gc.ca/cansim/a26?lang=eng&id=2820002 and CANSIM Table 051-0001 http://www5.statcan.gc.ca/cansim/a26?lang=eng&retrLang=eng&id=0510001&&pattern=&stByVal=1&p1=1&p2=31&tabMode=dataTable&csid=

disadvantage for later life work as well as with saving for retirement. It is important to consider what this means for career development.

## Later Life Career Development

Work has been and is a core human activity (National Career Development Association 2011). Paid employment is a basic human need, inherently related to health and well-being (Laliberte Rudman and Molke 2009). Work provides purpose and meaning, and this is the case for older adults as well. In fact, with longer life spans and the trend towards working longer, a new phase of career is emerging: later life career (Cook 2015, 2016). This new phase of career provides an opportunity for older adults to pursue work options and contribute their skills, knowledge, and experience to the community (Cook 2015). This is related to feelings of self-esteem and self-worth as well as well-being. In addition, work provides mental, physical, and social stimulation in later life (Cook 2011).

Career development occurs within the broader context of social, historical, physical, educational, economic, and demographic factors that impact workers (Connell 2011). Workers can face barriers to employment, and unemployment, underemployment, poverty, and disability are social problems (Laliberte Rudman and Molke 2009).

The growing interest in later life career affects employer organizations (Cook 2016). Within organizations, career development refers to how organizations structure the career progress of employees (National Career Development Association (2011). Thus, talent management policy is interconnected with later life career development. In other words, later life career development and older worker talent management influence older workers and their employment. Specifically, organizational policy influences older adults and their occupational objectives (Pitt-Catsouphes and Matz-Costa 2009; Schalk 2010; Thijssen and Rocco 2010). It is important to gain a better understanding of older workers and their motivations. This will help organizations develop policy for ageing workers that meets both organizational and individual needs and shifts the discourse surrounding older workers (Fabisiak and Prokurat 2012; Schlosser et al. 2012).

## Motivations for Working Longer

Contextual factors influence older adults' decision to work longer. These include social, demographic, and economic factors as well as technology. These factors intersect, creating a complex context within which individuals engage in the labor force. Some examples of this complex intersection are the higher education of baby boomers compared with previous generations, the labor shortage owing to fewer incoming young workers and the decrease in employer pension coverage (Wang and Shultz 2010; Klassen 2013; Lain 2016). Changing technology is another factor. For example, some jobs can become less physically demanding owing to technological advances (Hursh et al. 2006).

Older adults themselves report financial and personal reasons for returning to the labor force (Schlosser et al. 2012). First, changes in the economy influence the extension of working lives. Lack of financial security has pushed baby boomers (i.e. those born between 1946 and 1965) into rethinking their retirement. In fact, finances can play a large part in the decision to remain in the workforce, with older adults reporting changing economic conditions, debt, and greater financial need to work (Wang and Shultz 2010; Schlosser et al. 2012). Fewer workers have employee pension plans. This change, along with widespread movement from defined benefit to defined contribution plans, impacts people and their financial security (Klassen 2013; Lain 2016). In addition, women are more likely to be employed part time and to receive lower wages (Walker et al. 2007; Damaske and Frech 2016). Therefore, older women may need to work longer than men to save for retirement. Second, personal reasons include enjoying their work (Lain 2016) and finding work that aligns with values and provides meaning (HR Council 2010; Schaefers 2012). Individuals who find their pre-retirement work enjoyable, meaningful, and satisfying are more likely to work post-retirement (Kanfer et al. 2013; Schlosser et al. 2012). Research shows that older workers who delay retirement do so because of improved health, longer life expectancy, and changes in socio-cultural norms (Kanfer et al. 2013).

Pathways into later life employment vary and, despite an intention to work longer, some older adults are unable to work (Klassen 2013; Lain 2016). Higher levels of education equate to greater likelihood of being employed (Marshall and Ferraro 2007). Individuals may retire and then return to the workforce (McDonald 1997, 2007). Older workers may confront social attitudes and perceptions that position them towards retirement, rather than retention, retraining, or even recruitment into new roles (Berger 2009; Alon-Shenker 2016). There are also hidden and invisible job seekers among those aged 55 and older; some unemployed workers become discouraged and drop out of the labor force when they would rather work (Hedge 2008; Bernard 2012). This can be viewed as a waste of talent and human capital and it may reflect the marginalization and power inequity of older workers (Laliberte Rudman and Molke 2009).

## Some Facts Related to Ageing

Long-term health problems and chronic diseases tend to increase with age but disease is not driven by age alone (Ilmarinen 2012; Lain 2016). Older adults live with and manage chronic conditions, such as diabetes, cardiovascular disease, and certain cancers (Czaja and Sharit 2009). The incidence of chronic conditions in the later years can be influenced by experiences and health issues from earlier in the lifecourse, such as being overweight or obese, inadequate diet and physical activity, mental health problems and injuries (Ilmarinen 2012; National Seniors Council 2013). According to Ilmarinen (2012) about a third of men and women aged 50 to 64 urgently need adjustments at work to better manage their health and prevent early retirement and work disability. Furthermore, musculoskeletal issues, mental disorders, and depression require awareness (Ilmarinen 2012). In fact, depression is often reported as a reason for work disability and early retirement (Ilmarinen 2012).

The decline of physical work capacity and physical strength with age influences the performance of physical jobs (Lain 2016). This can be an issue in positions that are physically demanding. While repetitive work, handling heavy objects and jobs with “poor work postures” can have an impact on workers, there are individual differences in health status and functional capacity at every age (Ilmarinen 2012). To compensate and manage physical demands, older workers can shift into more administrative tasks, or train, guide, and mentor younger workers.

## Age Discrimination

Older adults continue to struggle against outdated attitudes and stereotypes. Older adults are currently active and engaged contributors within society (Czaja and Sharit 2009; Cook 2015; Lain 2016). They are also healthier and better educated than previous generations of older adults (Czaja and Sharit 2009). Yet they are viewed as a social and economic burden (Ainsworth 2002; Klassen 2013). Older workers report ageism in the workplace and this impacts their recruitment and retention (Ainsworth 2002; Lain 2016); however, age discrimination is prohibited in most jurisdictions (Alon-Shenker 2016). Older adults are vulnerable owing to a lack of power in society (Laliberte Rudman and Molke 2009).

Social perceptions and judgments associate older people with decline and feebleness (Minichiello et al. 2000). Older workers past a certain age are viewed as slow, incapable, and unproductive (Thijssen and Rocco 2010). These negative attitudes dismiss older workers, putting them on the margins of society (Berger 2009). Seemingly, some individuals are put on a pathway towards retirement, rather than being considered for recruitment, retraining, or retention, simply because of their age (Ainsworth 2002; Thijssen and Rocco 2010). This reaction is not a true reflection of their capabilities. Unfortunately, it influences the self-worth and self-esteem of older workers. This may unequally impact older female workers who experience intersectionality of their identity, being female and being older, increasing the stigma they encounter (Ainsworth 2002).

Ageism also may influence the length of time older workers take to find new employment, once unemployed (Bernard 2012). According to Alon-Shenker (2016), age discrimination is not always easy to prove. In fact, over the past decade in Canada, few complaints were upheld.

## Organizations: Benefits of Talent Management

Organizations need people to run their businesses. There are benefits derived from hiring and retaining older workers. As Eyster et al. (2008) state: “employers may need to do more to attract and retain older workers, many of whom are highly experienced, knowledgeable, and skilled. To attract older workers, however, employers may need to rethink traditional workplace practices" (p. ii).

Organizations gain many benefits from the value older workers bring. Older adults have more experience than younger workers (Loretto and White 2006). The wealth of practical experience they gain after working in different professional environments gives them an advantage when problem-solving, having honed their decision-making skills over the course of their careers (Stam 2009). Research indicates older workers are more committed and reliable and have lower turnover and absenteeism than other age groups (Peterson and Spiker 2005; Ilmarinen 2012). In addition, older workers are viewed as loyal, stable, committed, and motivated by employers (Loretto and White 2006). Older adults are also able to learn new skills and they are efficient performers when compared with other workers (Peterson and Spiker 2005). They have a better work ethic, take pride in their work, and have superior interpersonal skills (Loretto and White 2006). Owing to their extensive work experience, older workers are generally highly skilled, have a strong self-identity, and large networks (Kanfer et al. 2013).

In addition to adding value to the organization by offering a different perspective, they can also contribute by developing more junior employees through coaching or mentorship (Murray 2001; Allen et al. 2009). These intergenerational relationships are important as they ensure that critical corporate knowledge is transferred and not lost when older workers retire (Stam 2009).

Ilmarinen (2012) states that mental ability such as "strategic thinking, sharp-wittedness, considerateness, wisdom, ability to deliberate, ability to rationalise, control of life, holistic perception and language skills improve with age" (p. 1). Furthermore, maturity and work experience enhance the valuable social capital of older workers. In other words, older workers gain in professional competence and tacit knowledge including interpersonal and cooperation skills. Older workers have a broad social network. Finally, older workers have structural and organizational awareness. They have a broad perspective and understanding of the organizational environment as well as its internal processes and operations.

Overall, older workers are organizational assets who are eager to work and find opportunities where they are valued and respected. As Ilmarinen (2012) indicates, ageing makes the older worker better and stronger than before. There are benefits for organizations that better manage their older workforce and engage older workers.

The contributions of older workers in the workplace will become more critical in the future. Organizations with good talent management policy will find ways to use the strengths and experience of older workers as a human capital resource (Ropes 2011; Ilmarinen 2012). This policy must be linked to career development and growth for older workers so that they feel as if they are productive, contributing, and valued members of the organization. Cuitiene and Railaite (2015) indicate that better talent management practices can assist with work-family balance, increase employability, improve health, reduce stress, and improve relationships.

## Policy Context

The ageing of the workforce is also an important issue in other Western countries (Wang and Shultz 2010; Beck and Williams 2016; Lain 2016). The Organization for Economic Cooperation and Development has suggested that the success of member countries depends on contributions from the older population. Interestingly, some countries are dealing with a rapidly ageing workforce; therefore, there are some international examples of innovative talent management practices. In Japan, Tokuda and Hinohara (2008) found reemployment programs with flexible hours for individuals post-65, as well as health counseling, ergonomic practices, and preventative health care management, all of which were beneficial for older workers.

Within social policy, some governments have introduced changes to retirement legislation, either increasing retirement age or removing mandatory retirement in response to the coming shortage of workers (Schlosser et al. 2012). Changes in the economy and changes to employer pension plans have created the need for workers to remain longer in the workforce (Wang and Shultz 2010; Klassen 2013; Lain 2016). Other countries could follow these models.

The policy shift to extend working lives links to a neoliberal policy approach (Saad-Filho and Johnson 2005; Laliberte Rudman and Molke 2009), where work and retirement responsibility are removed from the public realm into the personal one. This may negatively affect older workers. The impact of longer labor force participation on older adults is that they will pay more taxes and have a shorter retirement (Sicker 2011). In addition, some older workers are low skilled, low waged, and unable to save for retirement (Sicker 2011). Disadvantage early in life often means they will also have difficulty working during their later years. A further issue is that the changing nature of work creates uncertainty, stress, and anxiety among workers (Sicker 2011). This impacts older workers along with the workforce in general. From a political economy perspective, keeping older workers in the labor force may impact youth through higher youth unemployment and participation in unstable, less secure work (Sicker 2011). There may not be sufficient jobs to support older workers' continued work (Sicker 2011). On the other hand, early exit may negatively impact the economy and labor force and also put a strain on public and private pension plans (Alon-Shenker 2016). Interestingly, longer working lives are promoted by social policy at the same time that older workers confront age discrimination (Laliberte Rudman and Molke 2009).

## Talent Management in Organizations

In this chapter, talent management is used as a framework to examine older workers' experiences in organizations and how organizations can assist older workers with career development. The next section will discuss research and policy around the talent management of older workers.

### Retention

Radford et al. (2015) outlined factors contributing to an older worker's decision to remain in the workforce, including location of the job, health, financial situation, family responsibilities, job satisfaction, and the conditions of the workplace itself. When employees experience job satisfaction, they are more likely to remain with the organization. Moreover, job satisfaction can be attributed to work conditions, work environment, and flexible work arrangements, not just pay (Tishman et al. 2012; Radford et al. 2015).

Some older workers face barriers and the risk of withdrawing from the workforce altogether (Buyens et al. 2009; National Seniors Council 2013). Workers may become pushed out rather than provided with workplace accommodation (Tishman et al. 2012). Age stereotypes are discouraging and can keep older workers from staying in the labor market (Posthuma and Campion 2009). Furthermore, as Brooke and Taylor (2005) indicate, age discrimination affects older workers' employment, job security, promotion, training, and retention. Consequently, this impacts older employees' views of organizational policy and fairness (Kooij et al. 2013). Stereotypes can become a "self-fulfilling prophecy" where older workers begin to believe the negative perceptions held of them, which can cause them to become disinterested, less motivated, and ultimately lead to poor performance (Buyens et al. 2009).

Organizations that engage in practices adapted to employees' needs that show employees they are valued may be more successful in retaining their older employees than jobs offering higher pay (Armstrong-Stassen and Ursel 2009; Crowne et al. 2014). This is because perceived organizational support creates a sense of obligation to the organization (Armstrong-Stassen and Ursel 2009).

In addition, technology and ergonomic design can aid retention. With an ageing workforce, roles and job functions can be redesigned to meet the changes of ageing (Tishman et al. 2012) and to identify suitable changes that can be made to retain older workers (Appannah and Biggs 2015). It may be possible to introduce equipment or technology that can help with physically demanding tasks (Hursh et al. 2006), or change the nature of the job from a more physical role to one that is less strenuous on the body by facilitating more mentoring, training, or performing administrative functions (Brooke et al. 2013).

Importantly, ergonomic design can alleviate some of the stress that is placed on the body (Silverstein 2008). The introduction of technological changes in the workplace can improve productivity and indirectly encourage older workers to stay in the organization (Hursh et al. 2006). For instance, BMW made changes to their production line to lighten some of the physical demands of the job for their older employees. The changes helped employees perform their work but also increased productivity and decreased product defect and absenteeism rates (PwC Golden Age Index 2016). Considering ergonomic design and technology improvements to decrease the physical demands of a position may become a best practice in more organizations as these inclusive policies may be beneficial to employees of all ages (Brooke et al. 2013).

Relatedly, motivation and job performance are two concepts intertwined with retention. Managers must understand the motivation of employees of all ages when assigning work tasks (Stamov Roßnagel and Hertel 2010). Motivation does not decline with age (Kanfer et al. 2013) but changes in nature or complexity (Stamov Roßnagel and Hertel 2010). Motivation is critical for retention of older employees (Stamov Roßnagel and Hertel 2010) and studies have identified social interactions with others, intrinsic goals, finances, and sharing knowledge as reasons for continuing to work (Kanfer et al. 2013). Motivation shifts from hierarchical advancement to work that is intrinsically-motivating (Hedge 2008; Kooij et al. 2013), maintains their skills (Kooij et al. 2013; Stamov Roßnagel and Hertel 2010), and offers security (Kooij et al. 2013). Over time, older workers change their work goals and objectives, and this may be a way of adjusting to changing circumstances (Stamov Roßnagel and Hertel 2010).

Work performance does not decline with chronological age (Kanfer et al. 2013; Kooij et al. 2013). In fact, years of experience on the job can equate to more efficient work by the more mature workers. Older workers tend to have high work competencies (Kanfer et al. 2013). Nevertheless, stereotypical views are still held by managers that negatively influence their decisions around promotions or training. This impacts older employees' views of organizational policy, training opportunities and organizational fairness.

Those who get a sense of satisfaction from work are more likely to work past traditional retirement age. It is important not to stereotype all older workers regarding their work motivation (Stamov Roßnagel and Hertel 2010). Ultimately, an individual's goals and motivation at work are more closely linked to their personal characteristics than to their age (Kanfer et al. 2013).

## Training, Development, and Learning

Mature workers are attractive to employers; their performance is better than new hires, their experience is valuable, and employing them saves training-related costs (Wang and Shultz 2010; Crowne et al. 2014). With new trends such as the introduction of new technology, the requirements necessary to keep up with the job are constantly shifting (Smith et al. 2013). Maintaining and developing new skills and competencies enables employees to keep their skills current. This allows employees to stay competitive in the labor market and contributes to positive ageing (Claes and Van de Ven 2008). This means that on-going learning, training, and skill development are required at work in order to successfully respond to changes in the workplace. In other words, lifelong learning is key in today's employment environment.

Career development demands continuous learning and older workers require on-going training and development in the organization. This is important for both retention and job satisfaction. Equal opportunities for learning and training should be provided to older adults (Ulrich 2003; Ford 2005; Chamahian and Tremblay 2011; Cox and Beier 2014). When training and development opportunities are provided, employees perceive this as an investment in them, which they then return in the form of affective commitment (Kooij et al. 2014). These opportunities show the employee that they are valued and useful (Kooij et al. 2013) and can be more important than higher pay and flexible work arrangements (Armstrong-Stassen and Ursel 2009; Crowne et al. 2014). Furthermore, training and development enable employees to gain new skills (Kooij et al. 2013). Finally, provision of regular and on-going employee development can contribute to a decrease in costs to the organization that would otherwise result from absenteeism, work injury (Williams van Rooij 2012) and turnover (Crowne et al. 2014).

Age-related stereotypes can influence decisions about promotions, work assignments, and training (Hedge 2008). Managers are not immune to these stereotypes, which can impact training opportunities (Posthuma and Campion 2009). Older workers can also be subject to layoffs as a result (Posthuma and Campion 2009; Cliquot 2015). However, research demonstrates that performance often improves with age and experience.

For example, employees become faster and more efficient at completing tasks and duties over time, and when there are declines they are generally small. Moreover, older workers find ways to compensate for any age-related declines in their performance by working more efficiently (Hursh et al. 2006; Posthuma and Campion 2009; Stamov Roßnagel and Hertel 2010). Nevertheless, older workers are often given fewer opportunities for training as they are deemed less capable compared with younger workers. They also receive less developmental feedback. Management may hesitate to select them for training owing to the perception that older workers have trouble mastering new skills (Posthuma and Campion 2009).

Training should be adapted to meet employee needs (Smith et al. 2013). Workers' perception of the training as well as the support they receive to maintain their skills are important, such as individual instruction, peer-to-peer learning and experiential learning opportunities (Smith et al. 2013). As Smith et al. (2013) explain, structured learning support is critical for employee engagement. Access to training and the delivery of training are additional considerations for training and development programs. The meaningfulness or relevance of training must be articulated. For training success, management support, trainee engagement, and commitment to put the training into practice are key (Smith et al. 2013).

There is a perception that older workers will not stay on the job for long and employers will see a lower return on investment if training opportunities are provided (Lazazzara et al. 2013). At the same time, older workers are often viewed as dependable, loyal to their employer (Brooke and Taylor 2005; Posthuma and Campion 2009), with a strong work ethic and low absenteeism (Posthuma and Campion 2009; Billet et al. 2011). They also tend to remain with their employer longer than younger hires (Cliquot 2015). Therefore, when training and development opportunities are provided, there is a return on the investment because older workers are less likely to leave the organization (Posthuman and Campion 2009).

## Recruitment

Older workers are among those who experience the most obstacles in finding new employment (Bernard 2012). In fact, among those seeking work, there are large differences regarding the time it takes to find employment. The average length of unemployment for those aged 15–24 is 11 weeks, for those aged 25–54 it is 23 weeks, for those aged 55–64 it is 29 weeks, and for those aged 65 and more, 32 weeks (Statistics Canada 2013).

It is very difficult to search for employment as an older worker (Klassen and Cook 2016). Older adults use different methods and techniques to cope with ageism. According to Berger (2009), participants develop “counteractions” and “concealments” to manage perceived age discrimination. Older adults maintain their skills, change their work-related expectations, and even conceal their age. In this way, they attempt to adapt and manage the age stereotypes of managers and supervisors.

Organizations require human capital to operate and they want to hire good workers who are committed through a long job tenure (Christensen Hughes and Rog 2008). By not hiring older workers, organizations overlook valuable, highly skilled, and productive members of the labor market (Tishman et al. 2012). Older workers may also be more committed to the organization than younger workers as there are lower turnover rates among older workers (Morissette et al. 2013). Research indicates that managers are influenced by negative attitudes and perceptions about older workers, rather than viewing them as individuals (Posthuma and Campion 2009). Stereotypes suppose that all members are the same and undermine what older workers bring to employers and the workplace. This results in discrimination against older workers, leading to situations where they are not hired (Tishman et al. 2012). However their commitment, which translates to a longer job tenure, can potentially save recruitment-related costs (Tishman et al. 2012; Appannah and Biggs 2015).

## Career Progression

Research indicates that older workers tend to be overlooked for hiring and promotions owing to their mature age, despite their experience (Posthuma and Campion 2009). Age can lead to fewer advancement opportunities and difficulty finding employment, resulting in early retirement (Radford et al. 2015). This can curtail opportunities for later life work. Common myths about older workers need to be addressed in organizations. This includes changing attitudes and perceptions about older workers and offering training and development to help them maintain their skills (Ford 2005). There are some examples of the innovative recruitment of older workers in the literature. As Schlosser et al. (2012) identified, IBM and Ernst and Young used their networks to recruit retired individuals for special projects through CEO-led campaigns.

The workplace is currently intergenerational and employees from various generations need to work together effectively (Brooke and Taylor 2005). Younger workers often turn to older workers to seek job-related assistance. This type of spontaneous training is called informal learning and accounts for a large part of learning in the workplace. Informal learning takes place through work experiences and plays an important role in employee development and engagement (Cunningham and Hillier 2012).

Mentorship can be reciprocal and benefit mentor and protégé alike; it can have a positive impact on career satisfaction and development (Cunningham and Hillier 2012). Opportunities for older workers to serve as mentors or to work on special projects can increase their capabilities, skills, and participation (Kooij et al. 2014). This type of training and development can be a job enrichment for the more mature employee and the more junior employee, making it a learning opportunity for both. Mentoring programs have been identified as a key talent management tool assisting with orientation, training, and retention. As a development tool, the benefits of mentoring for protégés are many, and include learning, coaching, career planning, and psychosocial support (Eby and Lockwood 2005; Allen and Eby 2007). Moreover, mentoring programs retain talent and can address the skills shortage currently found in some industries and business sectors (Murray 2001; Allen et al. 2009; AMCTO 2013).

Job security is an issue for older workers. With the increase in nonstandard forms of employment, including part-time jobs, contract work, self-employment, and multiple job holding, the nature of work has changed and it can be very difficult to find employment (Laliberte Rudman and Molke 2009).

# Discussion

In this chapter, older workers, their motivations for working longer, and the value they bring to organizations were described. Older workers' experiences were discussed within the framework of talent management including how this impacts their career development. Without organizational policy, older workers can become disengaged, underemployed, or unemployed. Older workers want to find ways to contribute and generate an income. Organizational policy can assist with the retention, training, recruitment, and career progression of older workers.

Policies for retention of older workers need to be designed to increase job satisfaction through, for example, better work conditions, work environments, and flexible work arrangements. Training opportunities can enhance employee engagement and make them feel valued and respected as workers. Technology and ergonomic design can increase employee retention and can also provide accommodation for issues of ageing or disability (Laliberte Rudman and Molke 2009).

Older workers need career development opportunities where they can continue to learn, set occupational goals, and move forward (Cook 2011). They want growth, development, and work that is meaningful to them. Training provides on-going growth for employee professional development. Without organizational policy supporting older workers, they may become disengaged or underemployed. This can impact the productivity and commitment of the most experienced workers in the organization.

The recruitment of older workers is also important. As organizations become aware of the benefits of older workers, they will be more interested in hiring them and this will assist with unemployment and underemployment. The shift towards greater numbers of older adults in the workforce is just beginning. Older workers can contribute and be an asset to organizations. Organizational talent management policy for older workers and their career development are critical; otherwise, older workers become an untapped resource.

Older workers have faced ageism and age discrimination in the workplace. Yet older workers are a growing segment of the labor force (Klassen 2013; Lain 2016). This fact engenders optimism for the future. As employers become more aware of the importance of the older workforce, the power imbalance between the employer and the employee may shift. For organizations to adapt to the ageing employee demographic, they will need to design policies that will promote the employment of and investment in older workers (Hedge 2008). Talent management for an ageing workforce may assist older adults in the workplace. Successful talent management requires alignment between the goals of the organization and employee development (Al Ariss et al. 2014). The first step is viewing older adults as an asset. This means education and awareness are required about the many potential benefits that older adults provide to organizations.

Talent management of older workers is interconnected to career development. This fosters a supportive environment where an investment is made in the development of older workers (Al Ariss et al. 2014). It is important to create a climate and culture that respects older workers and what they bring to organizations. Organizational policies may, over time, work to shift the negative beliefs about older workers (Hedge 2008; Ilmarinen 2012). In this chapter, talent management policies for older workers were presented that can help older workers with career development. These policies can help to address the marginalization of older workers, while demonstrating the value that they bring, and shift an organization's culture to be more "age-friendly" (Ilmarinen 2012). This can change the discourse surrounding older workers and increase their labor force participation (Ilmarinen 2012). Furthermore, these are issues of social justice and employment equity (Laliberte Rudman and Molke 2009; Alon-Shenker 2016).

Career development is lifelong (Cook 2015). Many jurisdictions, such as the UK and the USA, have moved away from mandatory retirement (Klassen 2013). Later life work is increasing and policies are required to support this change. A social paradigm shift is occurring. Greater proportions of older adults choose to remain in the labor force (Klassen 2013; Lain 2016). A change in perceptions, attitudes, and expectations surrounding ageing, work, and older workers is required within organizations to match these changes in society (Ilmarinen 2012). For this reason, it is important to change the discourse to one that values what older workers bring and pays closer attention to later life career development.

Career development can be viewed from individual and organizational perspectives. Individuals have occupational goals. Organizations have responsibility for good talent management to assist with the career development of older workers. A huge shift is underway as people work longer. Talent management systems should correspond to this shift.

Older adults are unique and different. They have different skills and abilities and face different challenges and barriers. They have different occupational goals. A new discourse that recognizes older adults and what they bring to the workplace can create a more respectful organizational culture. Awareness and education are required. In the future, more terms and concepts will be used to describe the move to a work culture that values and respects older workers and what they offer. As age-aware practices and age-friendly business policies become more abundant in both research and policy, we predict that intergenerational policy will also become more critical. An intergenerational perspective recognizes what all age groups can contribute and bring to organizations. This philosophy is reflected in the concept of talent management.

The career development of older workers is an area that requires additional research within organizations. In addition, social policy can do more to encourage organizations to hire and retain older workers. Policy can also facilitate more training and development opportunities for older workers. Furthermore, policy is required to address age discrimination in society. Finally, in the future, there is great potential for more mentoring programs in the intergenerational workplace, addressing organizational needs and the career development of workers of different ages. Research needs to examine this.

## The Power of Age

In Western society, a shift to a new discourse surrounding ageing is necessary (Laliberte Rudman and Molke 2009). Older workers have faced ageism and age discrimination (Berger 2009). This is despite the experience and maturity that they bring to organizations. In today's intergenerational society, it is time to focus on the power and possibility of age. Rather than judging age, it must be recognized as an asset that brings value. Without social change, older workers can become an untapped resource at the margins of the labor force, despite their abilities, skills, knowledge, and experience (Cook 2015).

Age and what it means to be an older worker needs to be reconceptualized and reenvisioned (Laliberte Rudman and Molke 2009). To change the discourse surrounding older workers, organizations need to view them as an asset and design talent management policy focused on recruitment, retraining, retention, and career progression. As their labor force participation rises, employers will benefit from an increased labor supply and reap the benefits that older workers have to offer (Beck and Williams 2016).

Adapting to the ageing workforce means rethinking organizational policies and this, as Beck and Williams (2016) state, "requires managers to have a better understanding of what older workers can contribute and the skills to deal with a workforce with diverse strengths, weaknesses and demands" (p. 1). Shifting the discourse around ageing and highlighting the talents of older workers are critical objectives. They will involve the promotion of an intergenerational focus and pro-age attitudes. Education, research, and policy will help to move this new vision forward.

## Conclusions

The ageing workforce and the shifting conceptualization of retirement mean that the number of older workers in organizations is increasing and will continue to grow. Organizations require new talent management policies for older workers. Policy for the talent management of older workers will become more important in the future. While there is research into talent management, policies do not appear to be widely used to assist older workers with labor force participation or career development. Organizations require a better understanding of older worker career development needs.

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# 7

# Age Management in Organizations: The Perspective of Middle-Aged Employees

Pia Heilmann

## Introduction

The Finnish labor market is undergoing considerable change: the eldest generation is retiring and a smaller young generation is entering employment. Therefore, it is important to commit people to continue working instead of retiring early. The portion of 65-year-old people will increase from 17 % to 27 % by 2040, and to 29 % by 2060 (Statistics of Finland, years 2009–2060). This situation causes problems for the national economy and also affects recruitment and retention of personnel in organizations. It is important to commit people to continuing their working life for longer than has been the case in the recent past. Health and work well-being are important aspects in the discussion of longer careers. Health, the meaningfulness of work, and the overall life situation were the most important factors that influenced career extension among older

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workers (those aged 55 and above) (Väänänen-Tomppo 2010). The study was conducted in Finland but the results can be applicable to other countries as well.

Populations living longer puts a pressure on career continuation. A career is defined as the sequence of employment-related positions, roles, activities, and experiences encountered by a person (Arthur et al. 1989). Traditionally, careers were defined in terms of a period of education, then work (typically 20–30 years), then retirement. However, career paths and patterns can differ from the "orderly" careers (the traditional, hierarchical, or "corpocratic" career, Kanter 1992). Under the boundaryless career concept (Mirvis and Hall 1994; Arthur 1996), an individual is responsible for his/her career progression and makes his/her career decisions. New ways of thinking about careers are increasingly important, as life spans are lengthening (77–82 years in developed countries) (Cascio 2007).

In this chapter, I focus on actions targeted at prolonging careers in the middle of the career—between ages 35 and 55—when people are in the middle age (Ilmarinen 2006). The key question relates to individuals' well-being at work during the whole of their working life. I argue that any sanctions at the end of a career will not promote longer careers, and that continuous action to improve well-being at work during the whole working life would be more productive. Work well-being can be improved through a range of actions and healthy people are more willing to extend their careers beyond traditional retirement age. In this chapter I will present different themes that relate to the problem of career prolongation.

The research question is *How can careers be extended in the middle of the career path?* The question is significant for Finnish society but is also important to organizations and individuals in another ageing countries. There are approximately 810 million persons aged 60 or over in the world in 2012 and this number is projected to grow to more than two billion by 2050. At that point, older persons will outnumber the population of children (0–14) for the first time in human history. Asia has more than half (55 %) of the world's older persons, followed by Europe, which accounts for 21 % of the total (United Nations 2012). On an economics level, there is a need to have people employed for longer and to collect tax revenues. The demographic structure and there being fewer middle-aged workers than workers from the older and younger generations means that in Finland it is important to commit people to organizations and ensure they remain satisfied. Finally, at the individual level, it is important to take care of employee well-being.

The theoretical framework of the study relates to career research and work well-being. Work well-being can be increased through human resource management (HRM) practices. People want to feel safe and secure at work; both physically and mentally. Therefore, prevention of both physical injuries and stress is important. Work conditions and tools should be functional, but on a mental level work well-being relates for example to leadership, communication, organizing, development, and flexible work arrangements. Individuals want to live complete and rewarding life incorporating work, family, and free time. Therefore, support for work–life balance is key if organizations are to attract and/or retain talented people. The most suitable work–life balance and motivation methods will depend on the subject. In many cases it is a question of tailored leadership; active communication between supervisor and subordinate.

The key HRM practices relating to career extension in the middle of the career are associated with training/education, organizing work, work–life balance, work well-being, leadership, labor policy/legislation, and attitude.

# Theoretical Framework

## Age Management as a Part of HRM

The backdrop of the study is HRM discussion. HRM represents the design, development, and implementation of interrelated people management practices that influence how well an organization can attract job applicants, retain motivated and successful employees, and ultimately impact job performance and organizational effectiveness (Noe et al. 2009). HRM can be used to describe any approach to managing people in organizations. It usually refers to all activities associated with the management of employment relationships in an organization (Boxall and Purcell 2003). HRM includes a set of distinct but interrelated activities, functions, and processes that are directed at attracting, developing, and maintaining (or disposing of) a firm's human resources (Lado and Wilson 1994, 701). HRM can be used as a more contemporary label for the activities formerly associated with personnel management. There are a variety of perspectives on what makes HRM distinctive (Beardwell and Claydon 2007): for example, human resource planning, recruitment and selection, commitment, human resource development and training, management and leadership development, reward and performance management, work–life balance, work well-being, managing equality and diversity, and international HRM. Notable research on HRM practices and well-being among the workforce includes Guest (2002), Peccei (2004), and Kersley et al. (2006).

The diversity approach views diversity in the workforce as relating for example to age, gender, race, ethnicity, disability, or sexuality (Torrington et al. 2011). Age diversity reflects the distribution of differences among an organization's members with respect to age, and can be conceptualized as separation, variety, or disparity (Harrison and Klein 2007). As a concept "age management" is not well established and difficult to define precisely, but it is not only a question of managing ageing people. According to Ilmarinen (2006) age management is managing people of different ages. There are four elements to the discussion on age management: the social, managerial, organizational, and the perspective of the individual worker (Halme 2011). The discussion revolves around questions of economic resistance, managing and understanding a different aged workforce, invocation of competence, and prevention of ageism (Vaahtio 2002; European Commission 2007; Simström 2009). Thus, the label *age management* as a specification for one perspective within diversity management inside HRM has become more rooted in the recent past (Arsenault 2004; Sintonen 2008; Pitts 2009; Halme 2011; Torrington et al. 2011). Consequently, age management can be understood as a collection of best HRM practices that seek to maintain and increase employees' work ability, and also to help organizations to reach their goals (Halme 2011; Aaltio et al. 2014). Naegele and Walker (2006, 1) define age management as "those measures that combat age barriers and/or promote age diversity." According to Ilmarinen (2006) age management requires taking the employee's age and age-related factors into account in everyday work management, work planning, and work organization, to ensure everyone—regardless of age—can achieve personal and organizational targets in a healthy and safe manner. Age management includes recruitment; learning, training, and lifelong learning; career development; flexible working time practices; health protection and promotion, and workplace design; redeployment; employment exit and the transition to retirement; and comprehensive approaches to the whole lifespan of the workforce encompassing preventative and remedial measures (Naegele and Walker 2006). Fuertes et al. (2013) examine employers' policies, practices, and attitudes to age management and report that older workers appreciate different work patterns such as flexible or part-time working. It is suggested that employees should be managed in a more age-sensitive manner (Aaltio et al. 2014) and that encouraging forms of working life that are better adjusted to reflect the age of the workforce and that can incorporate flexibility would be beneficial. Age discourse in organizations has previously concentrated on older people and has left out the other age groups. Age management research has mainly addressed retaining an ageing workforce and prolonging careers from the tail end of the career span (Morrisette et al. 2004; Armstrong-Stassen and Ursel 2009; Flynn 2010; Loretto 2010; Väänänen-Tomppo 2010; Midtsundstad 2011; Bal et al. 2012; Canduela et al. 2012; Dufva 2012; Fuertes et al. 2013; Aaltio et al. 2014). Recently an age discourse examining the younger generations—generations Y and Z—has emerged (Crampton and Hodge 2009; De Hauw and De Vos 2010; Deal et al. 2010; Tienari and Piekkari 2011; Solnet et al. 2012; Kultalahti 2015), but there remains little discussion focusing on middle-aged people.

## Work Well-Being

Wellness can be defined as an individual's state of physical and mental health (Jack 2004). Well-being is a summative concept that characterizes the quality of working lives, and may be seen as a major determinant of productivity at the individual, enterprise, and societal levels (Schulte and Vainio 2010). Well-being at work concerns an overall sense of happiness, the physical and mental health of the workforce (Peccei 2004). According to Grant et al. (2007, 52) and Warr (1987) employee well-being is the overall quality of an employee's experience and functioning at work. It refers to employees' overall experience or affect toward both the job and the organization (Kooij et al. 2013). According to Warr (2002) job-related well-being refers to people's satisfaction with their jobs in terms of facets such as pay, colleagues, supervisors, working conditions, job security, training opportunities, involvement, team working, and the nature of the work undertaken. Grant et al. (2007) distinguish psychological well-being (i.e. happiness), physical well-being (i.e. health) and social well-being (i.e. relationships), psychological well-being (i.e. organizational commitment and job satisfaction), and social well-being (i.e. organizational fairness).

According to Ilmarinen (2014) work well-being has four levels. On the first level is health and functional ability of a person and on the second level are competencies. On the third level are an individual's values, attitudes, and motivation. Finally, on the fourth level are issues relating to management, the work community, and working conditions. The four stages together create the combination of personal work capacity inside an organization. However, the operating environment also influences well-being at work. The fourth level issues lead us to investigate the situations in the family or immediate community. Individual and organizational function are governed by society, culture, laws, and educational and social security structures (Ilmarinen 2014).

## Research Design

The aim of this qualitative study is to show the role of age management practices in career extension endeavors. The key research question is how can careers be extended in the middle of the career. The data were gathered in 2011 and 2012 from three adult student groups in a Strategic Human Resource Management Course. There was a total of 48 students, who were studying contemporaneously with their work. There were asked to write essays on how to prolong careers in the context of

Finnish society and given 30 minutes to write their accounts. Since the average age of the research group was 42, so it can be expected that the respondents had considerable experience of working life and some ideas on career extension.

Content analysis was used to organize the essays into different career prolonging methods. The accounts confirmed that the issue of career prolongation is a complex one that can be approached through different HRM perspectives. The analysis of the respondents' essays does not judge which issues are the most important, but simply presents different approaches to the career extension discussion.

## Results

The results indicate that middle-aged people are willing to prolong their careers and to participate in the discussion about improving their working conditions. Improved well-being would encourage the respondents to continue their careers. The 48 accounts examined suggest the most important elements relating to career extension are associated with various HRM practices, the most important in terms of maintaining and lengthening employees' careers being training/education, organizing work, work well-being, leadership, labor policy and legislation, and attitude (see Halme 2011; Aaltio et al. 2014). These HRM (or age management) actions should be deployed in an age-sensitive manner (see Aaltio et al. 2014). I use some quotes from the essays under every theme to demonstrate the content of the data.

### Training/Education

It is important to provide young people access to student and career counseling services and help them enter the labor market. It is necessary to start the career earlier and more effectively. Educational institutes, schools, and universities should co-operate during the educational process. Training opportunities are important during the whole working life;

there must be opportunities for further education. Career change is also one option for prolonging careers (Ilmarinen 2014, Competence-level).

- It is important to invest in student counseling in schools. Young people should find their line of work earlier.
- For example, a highly skilled construction worker suffering from arthritis in the knees that prevents that person from roofing or tiling might be retrained to become a master builder.
- Making a career transition. A person will be more able to continue working in another profession.
- Improvement of apprenticeship training by development of apprenticeship education.
- Options for continuous training during working life.

## Organizing Work

Flexible work arrangements such as part-time jobs, remote work, flexible working hours, shaping work content, work rotation, and exchanging holiday bonuses for extra days of holiday can be used to prolong careers. Work content can be reorganized and made more reasonable for people of different ages. Many retirees want to continue their careers and voluntarily undertake temporary projects or work as a substitute in their former workplace (Ilmarinen 2014, Work, work community and leadership-level).

- In my opinion, the solution will be in flexible work arrangements. Well-being and meaningfulness of work will increase through any kind of flexibility.
- If the employer organizes rehabilitation for people suffering from neck and back pain, why doesn't the employer arrange therapy for mentally burdened employees?
- Downshifting and job rotation can help in career extension.
- Rotation of work, part-time retirements, shortened working hours, flexible working hours, possibility to change holiday bonuses to free time.
- Changes in work content and job rotation refresh employees.

## Work Well-Being

Organizations should also target countering burnout among the younger workforce. One action that could be useful in extending careers would be offering better options for balancing work and leisure time, and should also be in the interests of organizations. A good organizational climate promotes better well-being and influences career extension. Organizations can also encourage employees to improve their well-being by encouraging recreational activities. Various co-operation activities involving employer, employees, and an occupational health care unit might be trialed (Ilmarinen 2014, Work, work community and leadership-level and Health and functional capabilities-level).

- The more meaningful the work, the longer the career!
- Ergonomic working environment and fittings.
- Division of responsibilities downward in the organization. Possibilities for decision making relating to one's own work will increase meaningfulness and promote work well-being among employees.
- Possibility of work–life balance.
- Our organization actively supports recreational activities. We have a club that gets an annual welfare budget from the employer. The club arranges trips, games evenings, cookery courses etc.

## Leadership

Good leadership and organizational citizenship skills are appreciated among the studied middle-aged people. Age management actions and promoting respect for older workers were also mentioned as a potential tool for prolonging careers. Leadership and career planning options were valued when motivating people to continue their careers. Change management is important and supervisors should be taught to communicate better in change situations. Leaders should present visions of the future to their subordinates and encourage people to prepare for the future. Supervisors must also listen to the voice of the organization; for example, they should be aware of the atmosphere of the organization and the workload of employees (Ilmarinen 2014, Work, work community and leadership-level).

- Age management. Interaction, communication, and work task tailoring relating to age.
- By showing appreciation so that the employee noticed it.
- Refocusing the Finnish organizational culture more from objectives to individuals. It is important to development leadership, communication, and organizational structures.
- By giving little rewards. If a person stretched in the organization's haste situation, she/he could be paid back by giving movie tickets or Friday pizza.
- Force is a bad incentive.

## Labor Policy and Legislation

Rewards should be directed to encouraging a person to continue working instead of retiring. Furthermore, retirement arrangements should be more flexible; for example, offering more leisure time to grandparents. One method for continuing careers would be decreasing employer costs for firms employing people aged 60–68. More labor policy actions should be directed at younger people so that they can better combine work–family balance (Ilmarinen 2014, External operational environment).

- Actions targeting improving work well-being should be taken into account in corporate taxation.
- Lightening employers' payment burdens can be used as a carrot if organizations employ aged people—persons near the retirement age 60–68.
- More flexible pension schemes. For example, options to permit free time with grandchildren.
- Part-time retirement solutions.
- Possibilities of occasional work. Opportunity for projects or temporary work for aged people.

## Attitude

The general attitude toward older people in society is a key finding. A change of attitude would require cultural changes in organizations. Older people are not equally appreciated in working life when compared with the younger generations. “Haste-talk” in organizations was mentioned as a barrier to longer careers. People often tell their colleagues how busy there are. This kind of talk still increases a feeling of haste and pressure in the organization (Ilmarinen 2014, Values, attitudes, and motivation-level).

- Power of an example. Directors and political decision-makers should themselves continue working longer.
- More appreciation for aged people. Changing the attitude toward old people’s learning. It is often mentioned that aged people cannot learn.
- People should be encouraged in forethought, self-initiation, and activity. Everybody is responsible for their own well-being and competence.
- Improving the caring culture in both work and school.
- Stop talking about haste.

# Discussion

The discussion of career extension relates easily to the older workforce, and talk of how to extend careers at the tail end of the career. It can be understood because it is important to slow the retirement of the Finnish baby boomer generation. However, career prolongation objectives should be recognized during the whole career. Age management actions targeting career extension can be applied in the early, middle, or late phases of the career. According to the result of the study, career extension in the mid-career can be promoted by several means: training/education, organizing work, work well-being, leadership, labor policy/legislation, and attitude. Most important is to increase work well-being. For example, flexible working arrangements, such as part-time jobs, remote work, or flexible working hours, can facilitate people in the middle of their midlife rushes in work. This kind of flexibility in working conditions can also give employees more time for care work. Many employees have to take care of their elderly parents and small children concurrently. The older workforce could adopt a form of part-time retirement and participate in both working life and leisure.

Many of the methods for prolonging careers relate to the boundaryless career discussion (Arthur and Rousseau 1996, 6). The findings of this research emphasize the role of an individual in the career extension decision. People search for individual solutions and design their own working life. Decisions can be based on family reasons, training opportunities, or career options during the career. Organizations can offer different human resources processes targeting career extension, but the decision is ultimately made by the individual (Barley 1989; Arthur and Rousseau 1996).

## Conclusions

In this chapter, I have tried to show the relationship between age management practices and career extension by exploring how careers can be extended in the middle of the career.

The central phenomenon in the discussion on prolonging careers is the well-being of an individual worker. Healthy people enjoy their work more than those who are unwell and are likely to consider extending their careers beyond the current statutory retirement age. In many cases, persuading workers to do so will be a question of supporting and leading an individual in the right direction over that person's entire career. Different HRM practices used at the right time and right phase of a career support leadership and are central to promoting longer careers. Career extension decisions relate to the reactions of an individual employee. Therefore, the continuous interaction between the supervisor and the subordinate is important. It is essential for the supervisor to know what motivates an employee and then apply the right HRM practices when leading that person.

An organization can use various HRM practices when striving to deliver improved employee well-being in the organization. However, we can ask what the employee's own role is in increasing work well-being and prolonging his/her career. This is an important question that can be studied further in the future.

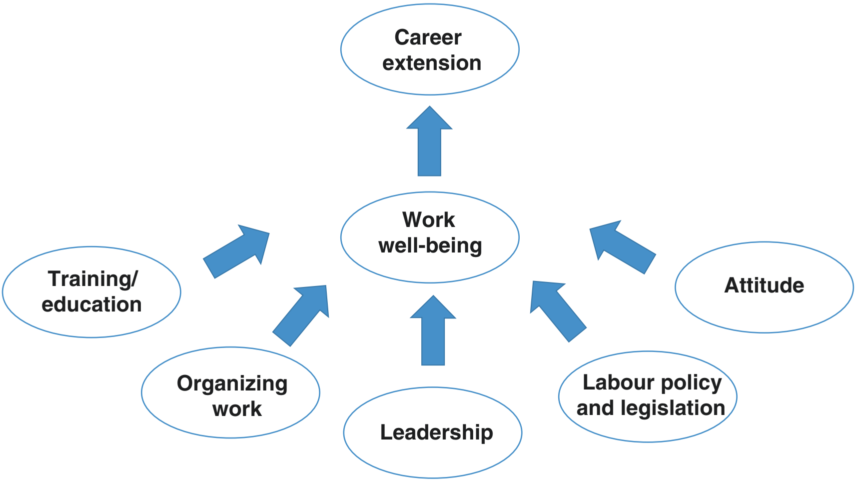


**Fig. 7.1** Age management practices that impact on career extension

In conclusion, it can be argued that high-level age management can be conducted with appropriate and age-sensitive HRM practices. Individually tailored leadership supported by different HRM practices can promote work well-being and increase the willingness to prolong the career (see Fig. 7.1). Different flexible work arrangements are important to create healthy organizations staffed by employees of different ages. This kind of situation benefits both individuals, organizations, and the economy.

The results of this study contribute to the discussion on extending careers in ageing societies by adding the perspective of the middle-aged workforce on career prolongation. The solutions that might deliver career extension include many dynamics. The legislation and general labor policy make a solid framework to good age management practices in organizations. A range HRM actions to assist in improving work well-being and welfare were mentioned, and that goal could in turn prolong careers. Employees should be managed in a more age-sensitive manner (Aaltio et al. 2014). Leadership and communication are important to the creation of work well-being. Different things motivate different people. It should be possible to decide and design one's own career path on the basis of one's own needs. Therefore, there is a need for organizations to differentiate HRM practices individually.

## Limitations

While this study is qualitative and the results cannot be broadly generalized, the methodology can be. The qualitative format also offers rich data and a deep understanding of the phenomenon. With qualitative methods it is possible to reach very detailed data, including many nuances.

For example, while the study was conducted in Finland and this represents a national case study, I would argue that the results can be utilized in another countries where the workforce is ageing. Finnish society is among the first in Europe to experience the phenomenon of "going gray" so the findings from the trailblazer may be useful to other countries.

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# Section 4

## Age and Gender at the Intersections of Organising and Managing

# 8

# Age in the City: Embodied Ageing in Financial Services

Leanne Cutcher and Kathleen Riach

## Introduction

In Western countries one way of dealing with the fiscal challenge of an ageing population has been through government policies that encourage workforce engagement beyond traditional retirement age. This push for workforce engagement is predicated on individuals 'ageing successfully' (Andrews 1999; Rudman 2006) by managing themselves and their lifestyle so that the effects and visible signs of ageing are prevented, remedied or minimised (Coupland 2007). While 'successful ageing' discourses implicitly acknowledge the embodied nature of ageing, they emphasis individualised ageing and overlook the relational and gendered aspects of embodied ageing. Further, 'successful ageing' discourses deny the situated nature of ageing and fail to recognise how the nature of work

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performed by individuals across the life course also impacts on how they age. If governments are going to create environments in which older workers can remain engaged in the workforce, then we need to better understand how age is embodied through social relations in particular contexts. In this chapter we seek to contribute to our understanding of ageing at work as embodied, relational and contextual by exploring how ageing intersects with masculinity in a particular organisational context. To date, studies of ageing at work have focused on women's experiences and the double blow of sexism and ageism that women experience in organisations (Trethewey 2001; Dean 2005; Ainsworth and Cutcher 2008). Very few studies explore the intersection between age and masculinity in particular workplaces (Comeau and Kemp 2007; Marchant 2013) and those that do fail to situate this as an embodied experience in the context of a given occupation. We show how ageing male bodies are shaped by occupational *and* organisational trajectories. We also show how the ageing masculine body can be a site for resisting a discourse of ageing as decline.

We suggest that the way in which people experience ageing at work tell us as much about their occupation as it does about ageing. For example, Foweraker and Cutcher's (2015) study of older pharmaceutical salespeople shows how the older men act as material signifiers of the organisation's strategy to sell off patent, tried and tested drugs. While some studies have pointed to the tension between the ideal worker and the ageing worker (Duncan and Loretto 2004; Encel and Studencki 2004; Guest and Shacklock 2005), there is a need for research that elucidates the differentiated experiences of ageing and gender in different industries and organisation (Thomas et al. 2014: 1573). For example, in the entertainment industry, women are given fewer lines in movies the older they get whereas older men are given more lines (Anderson and Daniels 2016). Exploring the link between age and occupation helps to shift the concern from age as a chronological marker to a focus on 'ageing' as a verb: an embodied process of 'doing', which is woven into everyday experiences of work and organisation. To date, studies of particular industries have focused on how workers can resist ageing by drawing on organisational and broader social discourses. For example, Foweraker and Cutcher's (2014) study of the pharmaceutical industry found that the older salespeople drew on sales talk and successful ageing discourses to construct what it meant for them to be working well beyond retirement age. Recent work theorising on ageing in organisations (Riach and Kelly 2015) has suggested that there are also particular aspects of organisational life informed by capitalist ideals that serve to organise ageing in ways that can marginalise older workers. However, there has been little empirical exploration of how this occurs in particular occupational and organisational settings and how it is experienced through the body. We aim to address this gap in our understanding by exploring the embodied practices of financial services employees' ageing projects. We focus on how the men's 'bodily reflexive practices' (Connell 1995) are founded in organising principles of masculinity, individualism and competence that reflect cultural norms in the financial services.

Aged between the late 30s and mid-40s, the men in our study were relatively young in relation to the life course, but considered 'old' in the financial services industry, which is lauded as a 'young man's game' where energy and ambition are markers of success. Exploring the way in which these 'men of action' (McDowell 1997) first begin to experience being 'aged by culture' (Gullette 2004) allows us to highlight the embodied aspects of ageing in a particular occupational context. We discuss three aspects that were prominent in our participants' narratives. First we discuss how 'material moments', flashes of bodily awareness about growing older, were situated within broader ideals surrounding competence and performance that constitute professional expectations. Second, we explore how changes in the body and the negative perceptions of ageing are resisted by invoking lifestyle or recreational choices (notably sport and partying) as a means of reinforcing the participant's masculinised professional identities. Third, we outline how participants' experiences of 'age as vulnerability' were carefully negotiated, by drawing on heavily masculinised occupational and organisational norms of the autonomy and success. In our concluding remarks we reflect on how professional norms serve to support some ageing strategies but can also negate particular expressions of growing older, even when these are intimately linked with occupational expectations and working practices. Before discussing our findings, we provide an overview of the literature on embodied and gendered ageing at work.

## The Ageing Male Body at Work

This idea of successful ageing has been taken up by gerontologists, policy specialists and advocacy bodies working on behalf of older people, believing that it opens up possibilities for 'activity, freedom, identity and health' (Rudman 2006: 182). As Walker (2009) highlights, 'active' ageing policies and practices encourage us to proactively shape our own older age by controlling how we behave, look, act and feel as a way of holding off the tyrannies traditionally associated with older age. However, as others have pointed out that in viewing ageing as a battle that needs to be resisted, fought or avoided successful ageing discourses fail to challenge biologically deterministic 'discourses of age as decline' (Turner 1995; Trethewey 2001; Ainsworth and Hardy 2009).

Moreover, discourses of ageing circulate within youth-orientated societies where being young is not simply a chronological marker but an ideology (West 2007) and has become the modus operandi of how every person should live their lives. This means that at every age we can feel compelled to have 'energy, restlessness, mobility, appetite for the state of wanting' (Sontag 1978: 73). Adoration of youthfulness feeds anti-ageing consumption practices, where ageing is undesirable but 'fixable' through surgery and health regimes (Wolf 1990). Subsequently, keeping fit is not only a physical pursuit but also an embodied lifestyle choice full of stylish gym gear and targeted workout spaces. The fixable self and the cult of 'healthism' (Dworkin and Wachs 2009) complement the current neoliberal ageing project where looking younger is not simply a matter of caring for the self, but indicative of being a responsible, morally sound citizen (Orbach 2009: 4). Whilst we may scorn those who seek to look ageless, such as celebrities who 'over-do' Botox or suffer the negative effects of a chemical peel, evidence suggests that women—and increasingly men—are engaging in cosmetic surgery, strict health regimes and other forms of body modification as the ageing body comes increasingly under scrutiny and is judged to be lacking in some way or another.

Such aspirations for the ageing body have entered organisations in two ways: first through the increasing importance of aesthetic labour; and, second through growing debates surrounding how the body is socially judged as being 'fit to work'. The link between looks and labour is not new, yet over time there have been shifts in the way that bodies are used and viewed in workplaces. After World War II, the focus on bodies shifted from a concern with the ability to undertake manual labour to bodies becoming a metaphor for health and functionality (Schwartz 1986). More recently there have been increases in consumer-focused sectors, and on 'appropriate bodies' in organisations where the embodied experience is the product or service for sale (Hepworth and Featherstone 1982; Warhurst et al. 2000; Witz et al. 2003; Wolkowitz 2006; Ainsworth and Cutcher 2008). Invariably in these service and sales encounters the 'right' look relies on a display of the culturally approved characteristics—such as youth and virility—within and upon the body. If employees bodies are indeed 'material signifiers' of the organisation (Hancock and Tyler 2007: 515), then it is unsurprising that a number of high-profile court cases have been associated with television presenters looking 'too old' to do the job (Judiciary of England and Wales 2011), or cabin crew being viewed as over the hill (Spiess and Waring 2005), the assumption being that there will always be a fresh supply of nubile young bodies to replace them.

To a lesser extent, the 'body-that-works' is revealed in a smaller corpus of literature broadly concerned with what constitutes a successful organisational body. The roots of this quest can be traced back to Frederick Taylor who meticulously documented the height, weight and age of each employee as a means of conceptualising the body as an extension of the tool or machinery being used (Wrege and Perroni 1974; Bahnisch 2000). The rise in white-collar work has seen conceptualisations of the 'body-that-works' shift from a physical occupational requirement to a symbolic one: fat workers are lazy (Luciano 2001), fit bodies symbolise professionalism (Oberg and Tornstam 2001; Waring and Waring 2009), and power dressing indicates competence (Entwistle 2000). This has had particular effects on the performance of masculinity at work. Messer (1990: 213) argues that with the decline of physical strength in work, such representations of the muscular male body as strong, virile and powerful have taken on increasingly important ideological and symbolic significance.

This increasing focus on the organisational body has particular implications for gender and ageing. A number of studies have shown how different meanings are ascribed to being an older man as opposed to an older woman (Ginn and Arber 1995; Harper 1997; Duncan and Loretto 2004). In the workplace context, the term 'gendered ageism' has been used to denote the differential impact that age has on the labour market experiences of men and women (e.g. Encel and Studencki 1997; Handy and Davy 2007). A number of studies have explored the way in which women negotiate being older at work against particular norms and discourses that marginalise them (Mills et al. 2006). For example, Trethewey (1999, 2001) has highlighted how all working bodies are subject to particular ageing effects that are invariably measured against a masculine norm. By comparison, Hall et al. (2007) show how gendered bodies in organisational contexts may result in different processes of identification by male employees depending on whether occupations are coded as 'feminine' or 'masculine'. Organisations continue to promote the classical concept of the masculine body (and by association the organisation) as fixed, disciplined and controlled (Bakhtin 1984).

Given the emphasis on the masculine body as the ideal working body, our research on growing older at work must therefore move from the idea of chronological age towards ageing embodiment. One way to explore this is by focusing on the 'doing' or 'making of bodily craft', defined by Wacquant (2005: 446) as 'socio-cultural competency residing in pre-discursive capacities that illumines the embodied foundations of all practice'. For example, Tulle (2008) shows how veteran runners undertake corporeal strategies that demonstrate ageing is not a physical, biological or cognitive phenomenon, but one that is an embodied experience. The veteran runners in her study achieve this by possessing a 'dispositional kitbag' built up over their lifecourse that helps to maintain an acceptable self as they become older (Tulle 2008: 14). Elsewhere, Wainwright and Turner (2004, 2006) demonstrate the potential of viewing the ageing body as an experiential holder and creator of occupational experience, which is active in the decisions, strategies and daily activities surrounding an individual's career trajectory. Whilst their study of ballet dancers focuses on a job where there is an element of a bodily craft that is explicitly physical, other studies of organisational life have shown that craft is by no means confined to one's own body. For example, Hindmarsh and Pilnick's (2007) analysis of anaesthetic teams identifies the ways in which the orientation and choreography of one's body needs to work in coordination, or in tune with, other bodies so as to achieve a complex level of bodily intuition that allows the work to be undertaken. While not directly concerned with age, their work highlights the value in understanding the experience of growing older at work as not simply a matter of individualised body/mind separation, but socially embodied negotiation. For us, this indicates that, ageing in a particular organisational setting can be viewed as both the experience of, and reaction to ongoing change, interaction and adaptation, whether or not it is consciously 'felt' or acknowledged. In light of this, our focus is not on age as a category, but on the way in which day-to-day choices, movements and strategies both utilise the ageing body and make sense of organisational and occupational life through the body. We explore how male employees in the financial services seek to control their ageing bodies so that they can continue to conform to both gender and occupational ideals.

## Ageing Masculinities in the Financial Services

The financial sector has long being synonymous with the production and reproduction of masculinity (Kerfoot and Knights 1993). McDowell's (1997) seminal research into the financial services highlighted hyper-masculinist cultures where virility and testosterone shaped what it meant to be a professional in 'The City': the square mile of the financial district of London occupied by international banks and financial operations and those who directly work within them. Zaloom's (2006: 113) account of trading floor in the USA and UK also highlights the resolute machismo of the financial sector, describing the 'maverick aesthetic' of a trader performing, through dress, postures and gestures, the 'physical being of economic man'. This hyper-masculine aesthetic invariably leads to gender inequality (Roth 2006). Further, such inherent masculinity also leaves little space for ageing bodies that may fail to embody the virile trader archetype. Our analysis explores how such cultures impact on the experience of ageing in the context of a hedge fund—a particular form of investment fund in the financial services—and how 'older' traders and other hedge fund employees actively negotiate their ageing in order to maintain an identity as a competent professional.

The data used to explore the above question is taken from a study of a UK-based hedge fund situated in the centre of London, to which we have given the pseudonym HFUK. The findings from this specific case are generalisable to other organisational contexts within the financial services sector and other occupations that exude a particular form of embodied masculinity (McDowell 1997). Hedge funds form part of the financial sector, although are not subject to the same regulatory mechanisms or controls as larger banks or investment outfits (see Hardie and Mackenzie 2007). Cultures within hedge funds replicate systems and behaviours borne of the financial sector. Whilst hedge funds are usually boutique in terms of number of employees, their operations deal with high levels of investment (the minimum investment at HFUK was £1 million). HFUK had been trading for over eight years—twice as long as the four-year life of the average hedge fund (Naik et al. 2007: 245). Author 2 conducted research over five months using ethnographically informed methods of data collection. The final corpus of data included over 150 hours of observation, the collection of a range of organisational artefacts (such as memos, emails or press cuttings about the company) and interviews with 53 members of staff at the hedge fund. The interviews ranged in duration between 25 and 75 minutes. The research field notes were a combination of research reflections, narrative descriptions of overheard conversations and informal talk between researcher and employees during quiet periods which were then recorded as close to verbatim as possible.

The analysis presented in this chapter concentrates on activity and data collected from the observation material and interviews with the 38 male employees across all departments in HFUK: trading, management and support (such as those in accounts and IT support), programming, operations and research. Their ages ranged from 26 to the early 50s, with a majority older than 35. Once transcribed and anonymised, interviews and field notes were coded and analysed with the aid of NVivo 10, a qualitative analysis software, which allowed us to identify, develop and connect a number of themes that emerged in the data. While bodies were not initially part of the research, it became clear from the early observations and interactions in the company that HFUK employees were expected to embody the organisational culture and professional expectations and that bodily practices mattered in this setting. The particular focus of our analysis here was on the spaces where ageing and masculinity featured in the experiences and actions of participants. To explore this we used a technique we call 'analytical topography', where we explored the landscape of the data to uncover the ways in which particular themes overlapped with each other in order to produce or legitimise particular ideas or beliefs. This allowed us to identify the points of configuration or divergence surrounding ideas of the embodiment, gender and ageing, and explore how particular discourses evoked a hyper-masculine, organisational identity.

## Material Moments

> I've got a tub of anti-wrinkle crows-feet cream. It's on our en-suite shelf and I've never even touched it … I asked for it to be bought for me. I guess in one of these kind of weird, material moments, and I've never used it. (Aaron, IT)

Although participants initially suggested that ageing was not something discussed regularly or formally, 'flashes' of awareness triggered by their appearance, bodies letting them down or by responses from other colleagues caused them to actively reflect on growing older. Our participants suggested that these bodily moments were received as 'warnings' and that they sometimes led to them making changes in their behaviour of lifestyle:

> In the last year I have become a lot more aware of age because I'm getting a few more grey hairs, do you know what I mean? It's just, you do, you just become suddenly a bit more aware, you look in the mirror and think 'Oh god, I am my dad!' and I suppose it does make you think 'Well, what have I achieved?' (Brian, operations)

> I'm kind of more aware of things like your knees start to ache a bit and you can't move round quite the same way. But I don't know whether that's due to ageing or lack of exercise or a combination of the two. It's just not some-

> thing that you're necessarily conscious of until someone comes along and reminds you! (Gavin, research/programming)

> It's noticeable if you play sport, you can measure things quite easily and, yes, you really see the decline! But that's more to do with lifestyle rather than actually one year older and stuff. You just have to adapt your lifestyle as you get older. You have to do more work [on the body] basically and I've never done the work. (Abel, research/programming)

Participants engaged in bodily benchmarking where they compared their bodies favourably with others in order to counter narratives of age as decline. For example, Andrew (research/programming) referred to being the same waist size as he was ten years before, and Aaron (Support) spoke of comparing favourably to friends from school in terms of looks when they periodically met up. Chronological markers of age were secondary in these discussions and did not constitute a reliable proxy for age. The way the body looked and moved was a more reliable measure of age. When the men did explicitly discuss ageing it was in terms of feeling different at points along the life course, thereby drawing attention to the body as an experiential marker of ageing. 'Material moments', where their embodied ageing was apparent, were not simply about appearance but related to 'moving body' and how it was the marker of growing older. It was the body's capacity to move or not as it once had that mattered more than the age on one's driving licence. In this sense, HFUK employees experience echoes Crossley's (2004) study of circuit trainers' reflexive body techniques, where their bodies 'understood' routines and how to use particular weights. In a similar way, the HFUK employees' bodies were an active site of memory, where the difference in undertaking the same activity over different points in their life was attributed to changes in the body. This corporeal memory worked alongside social expectations in relation to 'ageing successfully' so that the ageing body had to be worked on and ageing had to be resisted. In the next section we show how this resistance incorporated a denial of ageing and the appropriation of non-work practices into organisational discourse to demonstrate that ageing was something they could control.

## Subverting Ageing Assumptions

> Bring on the grey! It's coming, there's plenty of it coming! So it don't bother me, I'd like to be a silver fox. (Aidan, trading)

Age-related discourses and perceptions were well recognised and populated the talk of participants. However, in taking these age-related discourses and playing with them, the employees often sought to mould or subvert their interpretations in ways that could authenticate a positive professional identity. Primarily, the men resisted ageing by limiting talk about the negative impact of growing older to non-work arenas of their lives, in particular the sporting field and parties. Sport and exercise were engrained in the HFUK culture. 'Body banter' was an important part of the organisational discourse and used as a proxy for organisational competition: reminiscent of Orwell's (2013) notion of sport being 'war without bullets'. The idea of being 'men of action' (McDowell 2010: 653) was also apparent in day-to-day body cartography. For example, even during quieter periods, traders would stand up, walk around, look out the window or lean over one another's computers (often at YouTube clips of football-related stories). Such performances were supported by a strong gym culture where many employees talked about the benefits of keeping fit and healthy eating for increased concentration and endurance at work, or make disparaging comments about colleagues in other departments who were slumped on their desks and seen to 'mindlessly snack' on junk food.

There was no talk of ageing and its impact on their capacity to perform as hedge fund employees. Talk about the frustrations of ageing was limited to sporting activities. Participants often spoke about taking longer to heal after sustaining an injury, or feeling the effects of participating in sport. Any physical limitations in relation to work were linked to old sporting injuries or the long hours obstructing their fitness and health regimes:

> The neck aches—part of that is probably an injury from the gym, but I think it's sat at the desk when you're crouched over etcetera. (Finn, trader)

> Don't feel older than I was ten years ago. I know how I felt then and any difference would be physically, you feel a little bit of aches and pains now that you didn't feel when you were younger. Probably sitting at computers for years and years. (Conner, trader)

Sporting discourse and the physical markers of being fit helped to reinforce the competitive ethos of the specific organisational culture and the general culture of the sector. For most of the men working at HFUK, sport was 'conceived as a training in courage and manliness', 'forming the character' and inculcating the 'will to win' within the rules of the game—'fair play' (Bourdieu 1978: 824). Therefore, despite admissions of feeling physically 'different' in the sporting and fitness arena as they got older there was no talk of feeling tired, unfocused or distracted at work. It was fine to talk about being tired because of a sporting game or a night out drinking, but unacceptable to admit that the long work hours might be taking their toll.

Many traders spoke about hedonism and excess as integral parts of the City in the past, mentioning luxurious corporate hospitality, lavish spending on consumer goods and socialising (e.g. McDowell 1997). However, their patterns of 'work-related pleasure' changed as they got older. One programmer described his body as 'less elastic … I'm not able to sponge up the alcohol now', whilst many others mentioned how hangovers became worse as they got older:

> I'm one of the older ones working here, yes, feel it, yes, I do. But my recoveries are good, I mean I was out Wednesday night and I was right as rain yesterday. I had a big one on Wednesday night. But I suppose really I tend to just go out with … If I do go out I tend to go out with people I've known for a long time and are a similar age, and I don't really try and keep up with the youngsters. (Liam, trader)

> There's a group of us that go to socialise a lot and, you know, ten years ago it was just carnage, absolute carnage. We'd drink all the way through the night, go to a night club, get in at five in the morning, you're up at sort of seven o'clock the next morning, checking the papers, dealing with that. Same thing the next day, anyway, drive home on Sunday, fine, nothing, come into work Monday … I've noticed now, as we're all getting older, six of us went away for the weekend and on the Friday night we had a few

> drinks but didn't go to a nightclub, got in about midnight. 'Anyone want a glass of wine?' 'No, going to go to bed.' And it's funny because you've got a group of like six blokes all away from their wives and kids and the wives are probably thinking 'Oh I bet they're up to all sorts!' We're just sitting there like all farts, drinking tea, watching *Match of the Day*! [a soccer review programme]. (Ray, operations)

Drinking stories were a key part of workplace rituals and were integral to a form of 'conversational cockfighting' witnessed in pubs by Campbell (2000). However, when the company's performance was weak for a number of months in a row, the 'work hard, play hard' expectation could not be used as an excuse that might have impacted their competence or concentration. Instead, older participants often relied on past stories to bolster their credentials. They would talk about 'legendary' nights out, involving some form of consumed excess, thereby perpetuating the heroic rituals of 'working through the hangover' without having to experience the hangover in an ageing body.

## The Autonomous Ageing Body

The final corporeal feature of ageing was the production of an independent, autonomous future self. The future was continuous with the past, as they imagined themselves to continue being physically fit and financially independent. This future self would continue to be an active, autonomous individual. A key part of the future would involve body maintenance and physical activity:

> So as long as you've got health …, I mean it's a conscious thing, you have to keep healthy, you have to adjust your diet, adjust your exercise … they say you can add eight years to your life if you jog every day. (Andrew, research/programming)

> I still feel that the body is just something very, you know, overeating, you put on weight, if you don't take care of your exercise you're prone to injury, so you're kind of much more vulnerable physically. (Henry, management/support)

The HFUK employees worked on a model of individualised retirement, with the majority having their own developed portfolio of investments (rather than a government pension or savings packages): ‘all these pensions that are building up, I’m not relying on them’ (Henry, management). This is unsurprising given the sector; however, this emphasis on responsibility and accountability for an individual’s financial future also provided a basis through which they could frame all dimensions of their future life—including their bodies—as both able to be controlled and needing to be actively managed. Failure to do so was seen as a failure of the individual, and only resolvable by the individual. There were repeated suggestions that inability to care for oneself in some ways was the worst outcome possible in terms of growing older: ‘As I watch as people do get old and unable to look after themselves, I think “If I ever get there, shoot me!”’ (Dominic, management/support).

This autonomous corporeal self was also supported by the importance of the breadwinner model, and expectations of financially supporting others:

> Let’s be honest now, men are the hunter-gatherers, they have to go out to work to earn the money for all of those reasons. Typically society suggests that it’s typically the man that goes out to work and it’s typically the woman who has a part-time job or puts her career on hold or doesn’t have a career and stays home looking after kids. (Brian, operations)

Generous salaries and huge bonuses validated their success as professional alpha males (c.f. Hodgson 2003) and enabled them to send their children to private schools and service expensive mortgages:

> I’ve got a pretty clear picture, I would say, yes. I mean I’ve just had some plans passed on the house to do some building works on the house, so I could see me standing there with my wife, two children, in their school uniforms, at the front of the house, all done, all looking nice. You know, a nice family car sitting on the driveway, maybe the Ferrari in the garage. (Evan, operations)

Whilst the gendered division of family responsibilities and lavish lifestyles were often emphasised in employees’ talk, it existed alongside an awareness of the precariousness of ageing in a sector characterised by high rewards but also high risks in terms of sudden unemployment and stress-related health issues:

> Some other things I had done to sort of plan for the future financially: when my wife, when we discovered that she was having a baby, as we'd hoped she would because we decided at the end of the year that we'd try to have children, and I decided that I should have life insurance which I'd not had before, so I got life and critical illness insurance. (Ryan, research/programming)

Whether talking about their current occupation, their experience of ageing or their imagined future, masculinity scripts prescribed what they and others should aspire to. In one sense this involved a 'vision' of how things should look, both in terms of a metaphor and in terms of an embodied reality. To view their future bodies as autonomous and successful signalled not only an aspirational achievement, but also gave credence to their current body maintenances and lifestyle management practices.

## Conclusion

For decades governments and policymakers have warned of a looming fiscal crisis caused by the ageing of the population. Age looms large in public discourse. It also loomed in the lives of our financial services employees. It threatened their workplace identity because the financial services industry is still constructed as a young person's game, despite technology changing the physicality of the sector many years ago (McDowell 2010). Old age cast a shadow over professional credence and they resisted its attachment to the body. This meant that the physical signs of ageing and talk of ageing could only be acknowledged in the non-work spaces of their lives. The body was not working as it once did, but this was not because they were older but because they 'played hard and partied hard' and pushed their bodies to the limit. The possibility of disciplining and controlling their body demonstrated their capacity to work hard and countered the feelings of vulnerability. Age looms in the future and throws a shadow over their capacity to remain autonomous individuals. Our respondents were buying into the discourse of 'successful ageing' but explaining how they did this only at the level of discourse is not sufficient, since ageing is negotiated and experienced in and through the body. In short, we cannot understand ageing as a disembodied experience. The reflexive bodily practices (Connell 1995) and body crafting (Wacquant 2005) that the men in our study engaged in were shaped by gendered and organisational scripts and practices. They performed masculinities to challenge and overcome negative associations of old age (Tarrant 2010) and maintain their bodies to reflect occupational expectations surrounding control and competence in the face of extreme and challenging environments. As Connell (1995) argues in his text, the constitution of masculinity through bodily performance means that gender is vulnerable when the performance is threatened. Ageing poses such a threat and produces moments of 'biographical disruption' (Wainwright and Turner 2004: 117) that require individuals to engage in practices that reinforce their gender and occupational identity. An individual may have a sense of self that is built up and continuous over time (Giddens 1990) but ageing is accompanied by changes in how others see you and how you perceive yourself. In these 'fateful moments' (Giddens 1990: 109), or what one of our respondents called 'material moments', individuals gain a heightened awareness of the inconsistency between their stable inner self and changing external prescriptions. In the literature on ageing this disjuncture has been conceptualised in various ways; for example, 'mask of ageing' theories draw upon a Cartesian dualism between body and mind/spirit where there is distinction between an ageing body and a youthful inner self (Biggs 1997; Oberg and Tornstam 2001: 26). Engaging in sporting and fitness practices allowed our respondents to redouble or reframe efforts to maintain and meet these expectations within hegemonic masculinist frameworks. As a result, the importance they placed on displaying a 'fit', virile and contained body conflated masculinised ideals with success in trading and dealing.

Over time, greater investment in the body would be needed to prevent the signs of ageing and for them to avoid ageism and others questioning whether they could cope with the conditions of the market. As a result there were only certain spaces where the embodied experience of ageing in all its fecundity could be acknowledged. Sporting fields, gyms and bars were all acceptable arenas in which ageing could be discussed without detracting or compromising masculine ideals upon which their professional self was built. On the contrary, references to past sporting success, fitness regimes and partying hard helped to reinforce their ability to perform. This drew on both specific occupational characteristics and the hyper-masculinist spaces of the City (London's financial district) even as they grew older. We argue that the employee's reflexive bodily practices were shaped by working in the City and cultivated a shared attitude towards life (Crossley 2006). Subsequently, the body was a fundamental part of the presentation of the self to their colleagues, clients and themselves that reproduced the City. As Bourdieu (1978: 833) outlines, this 'body-for-others is the visible manifestation of the idea it wants to give of itself, its "character", that is, its values and capacities'. The participants' bodily craft (Wacquant 2005) reproduces an idealised version of 'how we do things around here' that mirrors the logic derived from the capitalist urban landscape—strength, endurance and rationality. Understanding ageing as a continuous, embodied process allows us to better understand how age is resisted and the limits of that resistance in certain occupational contexts.

Our research suggests that 'successful ageing' agendas fail to provide individuals with the coordinates to be able to navigate the complexities of embodied ageing and how ageing intersects with other points of identity such as gender and occupation. Professional men in HFUK saw their future selves as a continuous extension of a masculine ideal that had served them well in the past and would continue to serve them well into the future. However, by perpetuating the pervasiveness of masculinity, the spaces for negotiating alternative ways of working as one ages were limited and in turn reproduced a highly masculinised ageing agenda that may become increasingly difficult to uphold.

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# 9

# Old Age as a Market Advantage: The Example of Staffing Agencies in Sweden

Elisabet Cedersund, Gunilla Rapp, Carin Holmquist, and Elisabeth Sundin

## Introduction, Aim, and Concepts

Over almost all the Western world the population is ageing, which is often considered to be a problem not only for the economy but also for the elderly themselves (e.g. SOU 2012: 28; Fineman 2014). The economic aspect concerns an anticipated demand for elderly care and a low proportion of seniors on the labor market.

There are many examples of discrimination against the elderly, although the definitions of "elderly" and "old" are negotiated and constantly being constructed. But there are also examples of organizations

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using age, old age, as a comparative advantage on the market. In this chapter we will present and analyze staffing agencies that present and market themselves as organizations offering seniors to the customer. This is the main empirical aim of the chapter, and serves as a point of departure for a discussion about the possible advantages of elderly co-workers for both the market and for organizations.

The concept of gender permeates our economic and social life. Qualities and competence, including the meaning of gender as well as the meaning of age, are constructed concepts. They can change over time and are not defined the same way everywhere. Our descriptions and analyses are therefore presented with references to vital key concepts—age, old age, and gender. Entrepreneurship will be introduced as a relevant perspective as we emphasize entrepreneurship and self-employment as a labor market activity (cf. Sundin 2002; Bögenhold and Fachinger 2013). To avoid repetition of the key concepts in the text, the terms old age, elderly, ageing, older, and seniors are used interchangeably, as are staffing agency, enterprise, firms, and companies, as well as entrepreneurs and small-firm owners.

The staffing agencies and firms that we focus on use a niche encouraged by political decisions, as will be shown in the paragraph which presents the "staffing industry" in Sweden. The labor market functions differently in different countries and regions. Consequently, we have to address the characteristics of the labor market in Sweden—the setting for our empirical study.

We approach the subject of the chapter step by step. The description of the staffing agencies gives a point of departure for a discussion on ageism and how to counter ageism in an advanced economy and welfare state.

## The Labor Market, Age, and Gender in Sweden

Western societies emphasize the need for workers to work longer, but it is ageing employees who are most affected when organizations downsize or restructure, according to Buyens et al. (2009), who conclude that these facts are contradictory. Hence we can talk about obstacles in terms of both supply and demand. Both perspectives are evident in the international, national, regional, local, or even organizational specific norms of age. Age is not absolute and given, but constructed over and over again.

The age dimension is tricky, since age can be presented as a fact but with different meanings in different contexts for any one person at any one time (Krekula 2009). The view of what is old also varies with sectors and professions.

Labor markets are gender-segregated as well as age-segregated, to the disadvantage of women and elderly. Women are doubly affected, according to Fineman (2014); they are stuck with gendered ageism. Despite that, gender is not always included in the empirical studies of the elderly (Aaltio et al. 2016).

Older individuals meet a lot of assumptions—including that they are less flexible, less productive, and unwilling to upgrade their obsolete knowledge. These assumptions are used as an excuse for stereotyping and discrimination (Bytheway 2005; Brough et al. 2011; Hennekam and Herrbach 2015). The negative stereotypes are "currently omnipresent and, hence nearly unavoidable" conclude Kenrick et al. (2002: 105). The assumptions are just that, assumptions, as research often describes a more positive view in all dimensions than that held by public opinion. Older workers themselves are aware of the assumptions and apprehend a stereotype threat, an expression used by Buyens et al. (2009). The negative view of older persons is context and culture-bound: in the Western context, the systematic devaluation of being older has been given the label ageism (Butler 1969; Andersson 2008), making age defined as physical age a power system in the same way as gender and ethnicity.

Knowledge of what makes individuals willing to stay on the labor market has many components, including institutional politics for retirement, organizational practice, type of work, employee characteristics, preferences, and attitudes (Buyens et al. 2009). Age also has many interpretations in working life, including biological, psychological, and social (Kooij et al. 2008). When older individuals in Sweden are interviewed about their decisions to remain in or to leave working life they emphasize the importance of the attitudes and actions taken by their colleagues and managers (Nilsson 2013). Health—the individuals' own health as well as that of their family members—is also of great importance, as is what their partners do. The individual who has a retired partner is positive about leaving, while having a partner who is still working makes them willing to stay. These findings were also presented in a study from the USA (Ozawa and Lum 2009), where 70-year-old men still active on the labor market were asked why. Briefly, it was because they wanted to work, they were committed to work, and they could work. Many of them, however, did not want to go on as before: they wanted to be more flexible and perhaps also to work part time. These modifications are sometimes called bridge employment (see for example Kerr and Armstrong-Stassen 2011).

It is worth noting that economic arguments did not play any significant role in the studies so far presented, which can be explained by the national contexts in which the studies were done and by the individuals studied. Nations have different social and retirement systems and different policy options to encourage and support both individuals and employers in increasing the number and proportion of older individuals in working life (e.g. Barush et al. 2009). In some countries, the elderly are in a difficult position—they do not have a choice. Continuing to work is a necessity. The diversity of incentives can be presented in a model where economic advantages of continuing to work are pull factors, while not being appreciated works as a push factor (Maltby et al. 2004; Soidre 2005; Stattin 2009). "Jumping", that is leaving working life to do something more challenging, versus "staying on" for a socially rewarding working life are other concepts used (Maltby et al. 2004). The latter alternative implies that there are organizations where older co-workers are wanted as they have valuable expertise and contacts.

The macro-perspective includes the pension system. Under the Scandinavian welfare model everyone is included, but the outcome is related to their position on the labor market before retirement. As a group, women have poorer economic conditions than men (Pensionsmyndigheten [The Swedish Pensions Agency]). In recent decades the political system has made changes to encourage employers to hire older individuals and also individuals to stay in the market. In addition, a special reduction in income tax for wage earners under 65 has been introduced (Finansdepartementet [Ministry of Finance] 2007; Sundin 2014). These rules and regulations are continually changing.

An additional political tool to retain elderly in working life is to include age discrimination among the discrimination politics (Law of Discrimination Act 2008: 567; see also Sundin 2014). Another of the main grounds of discrimination is gender. The way the Swedish labor market and Swedish society work from a gender perspective has been described, analyzed, and classified as a gender system (SOU 1998: 6, 2004: 43; Hirdman 2002, 2004). Organizations are constructed by, and construct, gender, often with labeling as a tool. Work tasks, artifacts, and properties all have gender labels. A small minority are gender neutral (Statistics Sweden 2016, Figures on Women and Men). To sum up, we conclude that age and gender are important when understanding the labor market. We also find that the positions of individuals on this market are linked to age and gender. In Sweden, we find that although there are anti-discrimination laws, there is also segregation by age and gender. With this background we now present the empirical setting for our study—staffing agencies and entrepreneurship in Sweden, with a special focus on age and gender.

## Staffing Agencies, Age, and Gender in Sweden

Staffing agencies are a worldwide phenomenon. "The staffing industry's main markets are to be found in the low-wage segments of high wage, but *liberalizing,* economies" state Coe et al. (2008: 505). The staffing field is in a process of concentration, with the big companies increasing through buy-outs and mergers, globalization and diversification.

The position of the staffing agencies can be discussed in terms of types of flexibility from the perspectives of both the individuals and the organizations, both the staffing organizations and the buying organizations. Despite the trends of globalization, the definitions of the industry continue to have strong national differences as a consequence of specific cultural and geographical histories, and labor market rules and regulations (Coe et al. 2006; van Liemt 2013). Understanding and interpreting them requires adequate information on the contextual situation. It might be expected that unregulated systems mean a high share of employees working for staffing agencies, as is stated by Knox (2010). An example showing the opposite can be found in the case of Sweden, where the introduction of regulations for the staffing agencies and a signed agreement between the partners on the labor market was a pre-condition for the increasing use of staffing agencies in new occupations and unions (Storrie 2003; Walter 2005, 2013). The liberalization of economies all over the world was mentioned in the quote above as a reason behind the expansion of staffing agencies. Often discussed is the relationship between staffing agencies, precarious work, and economic recession (Holmlund and Storrie 2002).

In the national context of our study (Sweden), private employment and staffing agencies were forbidden for more than 50 years, starting in the 1930s. The reason behind the ban on private companies was abuse of the system during the recession in the 1930s (Bäckström 1999). At the beginning of the 1990s a decision was taken by the Conservative government to open up employment agencies for private providers in the Private Employment Agencies and Temporary Labor Act of 1993 (Swedish Code of Statutes 1993: 440). What happened afterwards has been described and analyzed by many researchers (e.g. Bergström et al. 2007; Walter 2013) There was, and still seems to be, an expansion. In the Swedish discussion, the question of flexibility (for whom) and security (for whom) has also been in focus. In addition, the question of whether staffing agencies offer entry to the labor market and an opportunity for young people or immigrants (Korpi and Levin 2001; Håkansson et al. 2012) to get their first job and prove what they can do is often discussed. However, the importance of such agencies for older individuals is seldom discussed. One exception is a chapter from the Swedish Staffing Agencies (Bemanningsföretagen 2012), the employer and trade federation for staffing, outplacement, and recruitment companies, which states that staffing agencies might be useful for/used by older persons, and also persons above the official retirement age of 67, if they want to keep in touch with the labor market.

From the start, young people have had a high level of representation among employees of staffing agencies. In the international literature, it can be seen that the same is true for women. In a Canadian study—where women demanding and being offered part-time work are a big group among staffing agencies' workers—there is no indication that the increasing number of men is reducing the female label of the industry, as the same working conditions apply to the new group of men. The outcome is presented as the feminization of the employment norms in the staffing agencies supplying temporary workers (Vosko 2000). In Sweden, too, women dominate among the employees in staffing agencies. The proportion of men has increased since the agreement between the labor market partners mentioned above came into force. The sex-gender dimensions of the staffing agencies do not challenge the relative position of women and men on the Swedish labor market (Korpi and Levin 2001; cf. Olofsdotter 2008).

In her thesis from 2008, Olofsdotter reflects that the employees of the staffing agencies, working for and in another company, have strong similarities with the self-employed as, in the cases she presents, they are to a great extent responsible for their own assignments. This perspective is further discussed in the next section.

## Entrepreneurship, Self-Employment, Age, and Gender in Sweden

Both women and elderly are underrepresented among starters of small firms. When it comes. to women, some of the explanations, such as lack of capital, are international (Brush et al. 2006) while others are national, such as describing the Swedish public sector as an obstacle that locks in women, giving them a "public sector mind" (Du Rietz and Henreksen 1999). However, in the international literature, the lack of public daycare for children is presented as an obstacle to women starting firms of their own. The correlation between a large public sector and self-employment for women is far from clear.

Another way of looking at the low number of women who are self-employed and owners of small firms is to emphasize the consequence of the male labeling of entrepreneurship with its consequences both in practice and on attitudes, which underestimates the numbers and proportion of women entrepreneurs (Holmquist and Sundin 2015) in statistics as well as in perceptions. The gender segregation of the labor market also includes self-employment and small and medium-sized enterprises (SMEs). As a consequence, we find that women, more than men, are self-employed in services in local markets and with restrictions when it comes to expansion. Despite that, women express a wish to increase/expand their firms and companies as often as men.

Women, as well as men, choose to work on their own for many reasons: a common argument for both men and women is the desire to be independent. Family obligations are more often explicitly declared as a reason by women than by men (Sundin and Holmquist 1989). Whether there are differences between women and men as entrepreneurs (and managers) is a question which is often discussed both in research and in the public debate. The main impression is that it is difficult to find differences related to gender. We wish, however, to mention that women and men seem to build networks in slightly different ways (Klyver and Grant 2010).

The phenomenon of older individuals as entrepreneurs and self-employed is not new in real life, although it has only recently begun to receive attention in politics and research. In the international literature, we see discussions on entrepreneurship as a means to avoid discrimination. Self-employment is also seen as bridging the gap between employment and retirement (Singh and DeNoble 2003), as is working for a staffing agency as argued by Bemanningsföretagen (2012). In the Singh and DeNoble (2003) findings, the senior entrepreneurs are classified according to the relationship between their old and new activities. Do they simply go on as they did before, but on their own, or are they doing something completely different? A third group is the older entrepreneurs who feel they have to continue for economic reasons, that they need the money. This is a reason also given by younger self-employed and owner-managers. Individuals citing these reasons are labeled "necessity entrepreneurs" in contrast to "opportunity entrepreneurs" (GEM (2016/2017).

In our own studies we find that women are underrepresented among older entrepreneurs in the same way as they are in other age groups, and that gender segregation persists (Sundin 2015). However, the differences between sectors, professions, and work histories are large and indicate important theoretical and political implications. Some of the international studies investigate and refer to differences between older women and men going into self-employment. The negative aspects of women having worked in the public sector in their "former life" are not supported in the studies made by Kautonen et al. (2010); or rather, other work histories, such as traditional male blue-collar occupations, seem to have a negative influence on intentions for self-employment. The negative image of older women as uninnovative and unentrepreneurial is also presented as a hypothesis by Kautonen (2008) following the discussion by McKay (2001), who stated that older women often find their real options are limited, because others, such as family and friends, have strong opinions on what is acceptable for their age and gender. We also know that women in particular take responsibility for older parents both before retirement and after (Lorentzi 2011). Having too little time to spend on their firms could consequently be an obstacle for older people, just as it is for younger people (Tillväxtverket [Swedish Agency for Economic and Regional Growth] 2014). We can see similar conclusions from the studies of individuals working for and with third-sector organizations such as football teams and the Red Cross (Gawell and Sundin 2014).

A further disadvantage for women is the lack of capital mentioned above. As senior women often have lower pensions than men they have less money to spare to start a business. A tight economic position might also have the opposite effect: women with very low pensions really need to work to make a decent living.

We have now briefly discussed findings from different fields of research to give an overview of what is known on age, gender, and entrepreneurship, focusing on the Swedish setting. As shown, there is a clear pattern of underrepresentation of elderly and of women in entrepreneurship, but at the same time, research shows that there are several reasons for older people and for women to go into entrepreneurship despite the barriers. Research also shows that the labor market as a whole functions differently for older people and for women. In particular, we have discussed the exit strategies from employment, where research shows that some older persons will continue working as employees—or as entrepreneurs. These transformative processes and the perceptions of age in the labor market are the focus of the empirical study we present in the next section. From the frame of reference we might expect that the staffing agencies in focus can easily recruit seniors wanting to work for many different reasons.

## Staffing Agencies with Senior Co-workers, an Empirical Study

### Identifying the Agencies

In order to use staffing agencies, which provide senior co-workers as our empirical data context, we had to know which agencies were active on the market. A survey of all staffing agencies in Sweden in early 2014 was conducted, using various methods. There were more than 5000 staffing agencies registered in Sweden in 2013 according to the Swedish Standard Industrial Classification (SSIC = SNI – Standard för Svensk näringsgrensindelning). Most of these are very small, often just one person, a solo entrepreneur, and the label "staffing firm" is used as the services offered are mixed. The majority of small staffing agencies were neglected in the "staffing research." The literature on the staffing agencies referred to above concerns solely large companies, mainly international established companies offering staff to other companies. In Sweden, the entire sector is represented by one company: Manpower.

The staffing agencies' trade association—Swedish Staffing Agencies (Bemanningsföretagen)—was contacted and they kindly helped us both to find the firms and companies and to discuss the questions of interest for the project and for this chapter. As will be presented below, the majority of staffing agencies are small and not members of the trade association. We mainly found these small organizations through job-sites advertising jobs for seniors. An internet search was also made using specific key words—for example staffing agencies, seniors, veterans, retired, older people, temporary work seniors. The popularity of the phenomenon means that there are many articles (but not many enterprises) in local papers, which we have used as a start, along the lines of snowball sampling (GP Ekonomi 2008; Arbetarbladet 2011; Folket 2013; Sydsvenskan 2013). Through these sources we found 18 staffing agencies marketing themselves as offering older co-workers. Some firms use the classification "staffing agency" on registration while others use the services provided, which will be shown in Table 9.1.

The multi-method used for the survey gives a full picture of the situation at the time. It is, however, transient, as small firms constantly appear in and disappear from the market. Eighteen is a low number, given the great interest shown in the organizations in both the local press and at the national level, where the leading daily business papers (DI 2012; DN 2012) state that it is the firms and companies supplying seniors who are creating the boom in the staffing industry. The boom also means that new companies are constantly appearing and that we are in a process of mergers and acquisitions.

The staffing agencies are frequently presented in a very positive light in the local papers, where the headlines and articles are often illustrated with pictures of seniors in action. The results of our survey, and specifically for the 18 enterprises, are presented below along with some key aspects. The information given comes, as a rule, from the material constructed and presented by the enterprises themselves. As can be seen from Table 9.1 the information given is not uniform, varying depending on the sources for the different agencies.

The second part of our survey investigates how the staffing agencies present "age." The main source regarding how age is communicated to the public is the information presented by the enterprises themselves on their websites. These texts, pictures, and other illustrations are presented in Table 9.2. Again, the information given is not uniform. A few of the enterprises do not use illustrations at all, while the majority use photographs of co-workers or customers to describe the service provided.

**Table 9.1** Staffing agencies offering senior workforce, 2013

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|---|---|---|---|---|---|
| No. | SNI-code (see list below) | Established year | Business type and form, locality | Turnover KSEK | Business plans expansion | Business starter M/W | Birth year of business starter |
| 1 | 78200 | 2012 | Joint-stock company Middle and south Sweden | 141,500 | Franchise Acquisitioned by a staffing agency | M | 1973 |
| 2 | General cleaning. Other personal service | 1997 | Joint-stock company International | 79,369 | Growth: organic and acquisition | M | 1997 |
| 3 | 78100 = 78200 + general cleaning | 2010 | Joint-stock company Middle Sweden Mostly the west coast | 22,155 | Through new local branches in 22 towns | M | 1975 |
| 4 | 78200 + consultancy activities | 1995 | Joint-stock company | 10,184 | Franchise | M | 1969 |
| | 78200 | 2009 | Private business, local | – | Franchise | M | |
| 5 | Joinery installation general cleaning | 2000 | Ltd partnership local | – | Expansion in due course | | |
| 6 | 78200 | 2008 | Joint-stock company | 24917 | Franchise | 3/M | 60s |
| 7 | 78200 | 2006 | Ltd partnership (KB) | | Local | M | 1960 |
| 8 | 78200 | 2008 | Joint-stock company, local | 6348 | Local branches in the region | W | 1961 |
| 9 | 78100, 78200, other personal service | 2002 | Joint-stock company | 1472 | Local | M/W | 1962 |

(*continued*)

**Table 9.1** (continued)

| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|---|---|---|---|---|---|---|---|
| No. | SNI-code (see list below) | Established year | Business type and form, locality | Turnover KSEK | Business plans expansion | Business starter M/W | Birth year of business starter |
| 10 | 78200 + tour operator activities | 2007 | Private business | 4052 | Networking | W | 1948 |
| | | 2011 | Joint-stock company | | | M | 1966 |
| | Other amusement act | 2012 | Joint-stock company | | | | |
| 11 | 78200 | 2007 | Joint-stock company | 316 | Local | W | 1943 |
| 12 | 78100, 78200 + other personal service | 1988 | Joint-stock company Six companies | 2713 | Reorganized 2008 Networking | 3/M 4/W | 1936 1944 1979 1942 1938 1974 1960 |
| 13 | | 2008 | Joint-stock company | 7980 | Franchise, in south Sweden Local branches in the north | W | 1946 |
| 14 | 78100 | 2010 | Joint-stock company | 1723 | Local | W | 1963 |
| 15 | 78200 + consultancy | 2010 | Private business | – | Local | M | 1955 |
| 16 | 78200 | 2012 | Joint-stock company | 2,130,976 | International | | |
| 17 | 78200 | 2007 | Joint-stock company | 19,303 | Local, high competence | W | 1961 |
| 18 | Food service, general cleaning, other support | 2007 | Joint-stock company | 8868 | Local branches in some cities Middle Sweden | M | 1976 |

**Table 9.2** Staffing agencies offering senior workforce. Examples of pictures from home page presentations, 2013

| No. | Woman | Man |
|---|---|---|
| 1 | Picking flowers. Wearing a sun hat | Two men and a ladder leaning against the house to be repainted |
| 2 | No senior (*comment below*) | No senior |
| 3 | Dusting desk, window cleaning, holding hand, filling the washing machine | Warehouse work, installing refrigeration, carrying board, in helmet in large industry |
| 4 | Grandmother with baby, face of woman with grey hair: "staffing on your terms" | Smiling in carpenter's overall, with paint container, "turn to us", joiners' tools |
| 4A | Woman with headset in reception, watering vegetables in shop, in garment shop, text for all pictures: competence | Standing at conference table with women taking notes, in bloom-plantation Text for all pictures: competence |
| 5 | Face: site manager (1) | Face: site managers (5) |
| 6 | Helping child with homework, with children in a swing | Pruning tree |
| | | Carpenter with drill |
| | Gardening (same women as above) | |
| | Sitting in an office chair | |
| | Sorting mail in an office | |
| | Three cleaners | |
| 7 | At office desk, "loyal employees" | In white helmet "see you later" |
| 8 | | Carpentry work, office work – at an office |
| | | Administrative help at an enterprise |
| 10 | | In overalls, working outside Sitting on outdoor staircase with tools |
| 11 | With school kitchen cap (*text below*) | Construction helmet (*text below*) |
| 12 | With computer | Painting fences, gardening, carpenter |
| 13 | Computer and office equipment | Overalls in store, window painting,14 group-picture |
| 15 | Holding small plant, gardening | Paint tin and roller |
| | Cleaning, window cleaning | Building and repairing |
| 16 | The Swedish "tant" (elderly lady) | – |
| 17 | Elegant in different contexts | Project leader, automotive testing |
| 18 | With watering can inside and outside | |

## Staffing Agencies with Older Co-workers: Survey Results

We have summarized the types of firms and companies studied, and present and comment on some of the key information in Table 9.1.

As seen, Table 9.1 has eight columns of information. The first column is the number of the agency. Column 2 shows the SNI codes (SNI = Swedish Standard Industrial Classification) used by the organizations themselves, where 78100 refers to "activities of employment placement agencies" and 78200 to "temporary employment agency activities." As has been mentioned, not all the enterprises use the "staffing" label in the register, or at least not solely. The decision to include these in our study is motivated by other information given by the agencies themselves. Column 3 shows the year of establishment. Column 4 presents information regarding the legal form of the organization. As a rule, a joint-stock company, in which a private business and the owner are separated, is regarded as the most "serious" legal form. A limited partnership is, from that perspective, like a joint-stock company. The information in Column 4, together with the information on turnover in Column 5 and the business plans presented in Column 6, gives a rather mixed picture, ranging from big units owned by international companies to small units with a tiny turnover. Franchising is used by five of the 18 agencies and networking is also introduced. Columns 7 and 8 contain information central for the aim of the chapter since it concerns the owner. In Column 7 we find information on the sex of the business starter and/or owner. Column 8 includes the year of birth of the owner.

As can be seen from the table, some of the companies are almost 30 years old while the majority are less than ten. The year 2007 can be seen as a starting point for a new era owing to some changes in the taxation system concerning services to consumers. This is an argument for focusing on older staff used by some of the enterprises, since the cost of older staff was reduced owing to the change in taxation rules.

The group of staffing agencies specializing in older employees is in a period of reorganization, with mergers and acquisitions, with the dominant big companies taking the lead. The biggest company, Agency 16, is an international company with one line specializing in age. The majority of the 18 are quite small. Some of them seem to have no customers at all. Some of these will probably disappear in the near future and be replaced by new companies. The organizational construction of the companies varies. Some, such as Agency 5 and Agency 14, are traditional small firms working in a local market. Some of them, with a common name, operate in franchise-like networks.

As can also be seen, companies offering older employees are as a rule neither started nor run by elderly people. We know the years of birth of owners of 16 of the organizations, and the owners have reached retirement age in only three of these (Agency 11, Agency 12, and Agency 13), of whom two are very small. Some of the seniors work in a network. In 13 of the 18 organizations we have information on the sex of the key actors: six have only men at the top, four only women, and three both men and women. The number and proportion of women among owners and managers is a little higher than among other firms and companies (Tillväxtverket 2014). There seems to be a connection between size and gender. Men are owner-managers in the four organizations with the highest turnover, which is in line with the situation in Sweden as a whole (Holmquist and Sundin 2015).

The staffing agencies have somewhat varying niches. The small staffing agencies offering older co-workers appear to concentrate on the private market and to exclude firms and companies seeking flexibility, as was discussed above. This business-to-business (B2B) market is totally dominated by big organizations, leaving the customer market to the small ones, a fact which seems obvious and in line with the definition established by the dominant actors themselves. Almost all the small companies offer families and individuals services to make their lives easier to manage, which can be seen in both the pictures used and the agencies' text. Why these enterprises label themselves as staffing agencies is a question that comes to mind, and this will be discussed in the final section.

Cleaning and gardening are typical services offered. This supply of services is a reminder that the staffing industry is mainly active in the low-competence segment of the labor market. We can also see that what is offered is mainly manual work. There is one exception (Agency 17), which offers managers and highly educated specialists in a network of more than 1700 individuals. Other actors in this section do not use the staffing concept and/or do not use age as an important dimension. It should also be noted that doctors and nurses have their own staffing agencies, not covered by our study.

As a summary we would like to point out that the number of staffing agencies is always very small, that few seniors are found among the owners and managers, that "staffing" is not always given as the official label although it is used in marketing and presentations to potential customers, and that what is offered is, as a rule, personal services targeted to the consumer.

## Age as an Argument Used by the Staffing Agencies

The staffing agencies themselves present various arguments for hiring older staff to the customers. In Table 9.2 we present texts produced by the staffing agencies on their websites for descriptions and analyses.

The arguments in the texts are often economic in nature, referring to the construction of the Swedish tax system which, as mentioned above, makes it cheaper to hire a senior than someone else. Many of the services offered by the agencies are eligible for a tax reduction through the RUT and ROT deductions. RUT applies to female-labeled services such as cleaning, and ROT to male-labeled services such as property maintenance. The deduction is an argument used by the staffing agencies, although it can be used by all organizations, not just those with senior employees.

Many of the arguments highlighted in the staffing agencies' presentations relate explicitly to age—old age. The expression "old is the oldest" (*gammal är äldst*)—a Swedish expression which implies a positive association with experience—is often used. Sentences such as "the most experienced team," "experience and quality," "job satisfaction," "reliability," and "flexibility" are other catchwords used. All these expressions are very positive, relevant in all parts of working life and of the utmost importance for some services.

Fifteen of the 18 organizations use pictures on their websites, in their brochures, and in other marketing materials. A few of the enterprises have no individuals in their material. Some of the pictures are described briefly in Table 9.2. The pictures chosen as descriptions represent the enterprise and the presentation given. The pictures show a range of seasons –from spring gardening to shoveling snow in the winter. The table is followed by a discussion on the message of the pictures.

In all the Agency 4 pictures, "Competence" is printed in red letters. A picture from Agency 2 shows a man, a father, lying in the grass with his child on his chest. The text says "mowing the lawn at the same time." Another picture shows a young mother playing with her child and the text tells us "weekly cleaning at the same time." The same help message is also used in some of the pictures by other agencies, such as Agency 4, which shows a woman with a headache at work and the text saying "Order help!" and the conclusion presented in a picture from Agency 6 of three ladies about to start cleaning, saying "We make life easier." These examples concern individuals and families, the main category of customers for these enterprises. Among the pictures we can also find examples from businesses. The arguments are similar to those presented to families, namely to make life easier, and also economic: "Pay per hour," "The same veteran every time," "Experience means a quick start." The main impression is that small firms are the potential customers.

The pictures show individuals either as customers or as suppliers or both. The employees in the pictures look middle-aged rather than old. Grey hair and grey beards appear often, but not always. Some of the companies only show (seemingly) young people in the pictures presenting their companies. One man representing an organization for retired persons told us in an interview that they were advised to show young people in the material used to recruit new members "as people do not want to think of themselves as old" (cf. "lookism" mentioned by Fineman 2014). But the majority of the pictures show a workforce who seem to be of retirement age.

As can be understood from this summary, the presentations are very gender stereotypical. The activities presented are also very conventional when it comes to gender segregation on the Swedish labor market and in Swedish families. The work tasks men do seem to be more diversified and also more qualified, including the equipment and tools used. Two work tasks seem to be unisex—gardening and window cleaning. However, gardening is also divided by task: a woman holding a small plant and a man pruning trees. Window cleaning has had a special gender dynamic on the Swedish labor market (Aurell 2001). It seems to be the woman's responsibility in the home and a man's job on the market; so companies can present it both ways. Both men and women appear in pictures representing all staff. One, of hedge cutting, shows a man and a woman working together. In summary, the picture and text material shows that gender stereotypes are not challenged by the companies and that age, when mentioned, is often used to describe the co-workers from a positive perspective—as experienced and reliable. When co-workers (and customers) are shown in pictures they are not too old, but rather middle-aged, albeit sometimes with grey hair.

## Discussion and Conclusions

Staffing agencies providing senior co-workers are here used as an example of how ageism in working life and society can be handled and even used—something that is presented as a necessity for the future. Our initial plans and lines of arguments were challenged by the empirical findings. The organizations providing older co-workers were not as many as we expected and they were not on the market as we expected. This made us formulate the question "Why do the eighteen enterprises label themselves as staffing agencies although they do not follow the criteria?" The industry itself states as a criterion a focus on supplying other organizations with co-workers. One explanation is that the staffing industry is now acknowledged as a serious actor on the Swedish market. That label is used by the enterprises to emphasize respected market activity although the co-workers are seniors. The label can also be used to recruit co-workers who hesitate to start cleaning or other activities that suffer from low-status and low-competence associations, or do not want to take the step to be self-employed or to go back to regular employment (cf. Kautonen et al. 2010). Choosing the label “staffing” has consequently to do both with the legal form and demands connected to the form and the content.

In the first part of the chapter we presented research on age discrimination and on how the elderly react and act to handle the situation. This frame of reference leads to expectations. We might expect the staffing agencies in focus to easily be able to recruit seniors wanting to work for many different reasons. Our main interest is the staffing agencies: although they specialize in older co-workers we may expect these co-workers to be presented as vital and comparatively young, since old age has so many negative associations. Age, old age, in these cases is a prerequisite for experience in a way that cannot be accumulated without limits: old is good, but older is not better. What the individuals bring with them is not just their experience but an expressed willingness to work, especially in a non-discriminatory environment, which the staffing agencies can offer. Working for a staffing agency sometimes means that you are responsible for fixing your own contracts, which is the situation of the self-employed. But there are differences as well. As a self-employed person, you have to handle all the administration yourself. As a co-worker in a staffing agency, you are a member of an organization.

When an individual works for a staffing agency, many of the disadvantages dominating working life are avoided. The individuals are recruited for their competence and characteristics, and age is one of the relevant factors. Age is not an issue that causes inconvenience for managers or for colleagues. The threat of stereotyping is not present in the staffing organizations. But of course it can persist on the market. Pull and push factors may be at hand simultaneously. It is up to the agency to handle this. Their strategies could be described as a decoupling of chronological age from functional and psychological age.

The qualities and images of old age regarded as valuable by the companies are often arguments emphasizing the importance of experience and reliability—both positive arguments in favor of age. The gender segregation on the labor market and in the homes is followed “to the letter.” The services offered can be analyzed from the perspective of both suppliers and customers. For the female-labeled services in particular, the potential customers seem to be young people or families wanting a clean and pleasant home and good, healthy meals, but who do not have the time to attend to these tasks themselves. Young people are assumed to value experience and reliability. The latter qualification is important when you let someone into your home.

When it comes to cleaning and other female-labeled and dominated services there are, in most parts of the country, many competitors, including some small firms and companies. For the male-labeled services, such as reconditioning small houses and flats, the situation is different. There is a lack of supplying firms. It is a well-known fact that it is very hard to find someone who works for a big firm to come to your home and fix your drain. Tradesmen, especially the self-employed, have a reputation for being unreliable and "never coming at the time they promised." Experienced and reliable tradesmen are therefore in demand and a forceful argument.

The market for services to the elderly is expanding. It is therefore surprising that the staffing agencies, with one exception, do not seem to see the elderly as an important customer group. Perhaps the references to primarily younger and middle-aged households can be explained by the negative image of age that also exists among the group of seniors. The latter may also be less impressed by experience than young people. They have experience themselves, although they do not have the physical fitness, or the wish, to do the work themselves.

The owners and managers of the staffing agencies offering experience and reliability are, as is seen in Table 9.1, as a rule below retirement age. There are, however, some differences related to the organizational structure. A number of older owner-managers can be found among the people responsible for firms working in networks and franchise systems. It may be easier to take the step to entrepreneurship in an established working system. This argument is often used by franchisors (Longenecker et al. 2014) and could be of even greater relevance for older individuals.

The proportion of women among the owners and managers of the staffing agencies is a little higher than in other age groups in Sweden. We argue that this is, in an international comparison, an unexpectedly high proportion (GEM). Internationally, the generation of women now retiring has been on the labor market to a lower extent than men. In Sweden, the women now retiring have been working outside the home to almost the same extent as men. Four in six women belong to the senior group over 60 years of age compared with five in 14 men. These figures indicate that older women are more active than older men in senior staffing. Among older entrepreneurs in all sectors the opposite is true, as it is in other age groups.

In conclusion, we have described the staffing agencies classifying themselves as offering old employees, most of whom, as seen in Table 9.1, have low turnover. The fact that small enterprises dominate is typical for all sectors. Despite that knowledge, we were surprised, as the staffing industry relates to a number of people—one person is not what could be expected. Why the label is used was discussed above. The big national and international staffing agencies may offer senior staff without marketing the fact or using it as a comparative advantage. The proportion of retired owners is higher than in other sectors but far from dominant (Sundin 2015).

The arguments for the importance of senior employees are closely connected to the image of older persons—reliable and experienced—but also challenge some stereotypes, such as inflexibility. Flexibility is emphasized and used as an argument from different perspectives: quantitative and qualitative. Quantitative means that elderly give of their time and that they can increase their work effort. This flexibility is often combined with stability and continuity, as the same individuals are told to be the providers. Another kind of flexibility concerns the qualitative dimensions—what is done and should be done. The long experience of older staff means that they possess the good judgment necessary to take decisions and to adapt without bothering the customer with questions. The same kind of concepts and expressions are used both for women and men, but the pictures illustrating the work to be done are very gender-stereotypical. So age does not seem to change or challenge the gender labels of either work tasks or equipment. The results, however, problematize the statement that "only women have age." From the marketing material it is obvious that "men have age" too. Both retirement age and gender-stereotypical competences are arguments used on the market by the staffing agencies. These arguments can be used by young owners and managers, not only by seniors themselves.

An ambition of the chapter is to challenge age discrimination for the benefit of elderly themselves, of organizations and of society. The strategy of using staffing agencies offering senior co-workers as a method turned out to be problematic. Despite that, we can combine the findings with the frame of reference to reflect on age and ageism. The willingness to work, on the market, can be realized in other contexts than regular employment or self-employment. This opens up for initiatives of many kinds. Services, in particular personal services, is an expanding market. In many of these, seniority is an advantage which could be elaborated and expanded.

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# 10

# Reconciling Employment and Caregiving: Good Workplace Practices and Arrangements

Kaisa Kauppinen and Mia Silfver-Kuhalampi

## Introduction

An increasing number of working-age people in Finland as well as in other Western countries have informal care responsibilities, most commonly towards their own ageing parents, partners, in-laws or other family members who need help and care because of illness, old age or disability. Combining employment and family care is becoming an important workplace issue (Kröger and Yeandle 2013), which employers need to solve when developing flexible management practices. The need for family care is closely linked to the ageing process, which is strongly affecting social structures and working life in all Western industrialized countries (Colombo et al. 2011; World Bank Report 2016).

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As the baby boomer generation in these countries moves through the age pyramid, older cohorts are becoming more numerous than younger ones. The number of people aged 65 and over will rise, while those between 15 and 64 will decrease. As a result, the dynamics of society will change. The ageing process brings with it some conflicting trends. On the one hand, workers in midlife are urged to stay on at work for longer due to dependency and other pension system crises. On the other hand, the growth in the ageing population has resulted in concerns regarding the availability of caregivers, formal as well as informal. Formal care refers to care provided by trained professionals, such as nurses, home care workers or care workers in care homes. Informal care means care provided by family members, relatives or friends in their informal roles. In contrast to many other European countries, in Finland and in Sweden as representatives of Nordic welfare states, adult children of elderly parents are not openly or by law 'responsibilised' as caregivers, but the restructuring of public care services has implicitly increased the expectation that family members should provide care (Jolanki et al. 2013).

Nordic countries have triumphed in organizing high-quality childcare when children are small so that parents can fully participate in employment outside the home. In contrast, legislation concerning attempts to reconcile employment and care for older people is far less developed. In most cases, it is typical for people to make workplace arrangements such as flexible work schedules, taking short leaves of absence or relying on the good will of their supervisors and co-workers (Kauppinen 2010).

One strategy to help family carers balance their caregiving roles with employment is to establish more formal arrangements based on legislation and work contracts. As stated before, the position of family carers in Finland and other Nordic countries is barely recognised in national employment legislation.

Some changes have taken place. In Finland in 2011, a new law was put into force to strengthen the options for care leave for employees caring for older parents or another person close to them. The law can be seen as a first step to recognise more formally the role of caregivers in Finnish employment legislation. The leave of absence was legislated as unpaid, but the employee can return to the same work duties after the caregiving needs have been fulfilled. The length of leave has to be negotiated with the employer.

## Previous Research on Combining Employment and Care Giving

In order to study these issues, a set of questions regarding informal family care was included in the Work and Health in Finland Survey (Kauppinen 2010). The question was 'In addition to your paid work outside the home, do you care for a person who needs help because of illness, disability or old age? This person may be your family member, neighbour or someone else who needs help and care.' In 2006, 20 per cent of employed women and 17 % of employed men answered that they provided care for someone who needed help at least once a month. In 2012, the corresponding figures were up to 31 % for women and 22 % for men (Kauppinen and Jolanki 2012). In absolute numbers, this accords to about 700,000 Finnish working women and men who regularly provide care and help to a family member, a close friend or a relative. This care activity is most typical among workers belonging to the 55–64 age group, which is also in accordance with the Organisation for Economic Co-operation and Development (OECD) report (Colombo et al. 2011).

A special study of family carers belonging to the middle-aged group of 45–63-year-olds was made based on the Work and Health in Finland Survey in 2009. The survey showed that 62 % of the carers were women; in most cases (79 %) the person for whom the care was provided was their own or their spouse's parent. In terms of work satisfaction or enthusiasm about work the caregivers did not significantly differ from those who did not report similar care responsibilities. Therefore, caregiving responsibilities were not related to a decreased interest in work itself. However, the findings showed that those with caregiving responsibilities had more problems with their own health and more doubts about their work ability (Kauppinen and Jolanki 2012).

Similarly, a Swedish study (Ulmanen 2015) focusing on the same age group (45–63) of working carers in 2013, showed that those workers with caregiving responsibilities suffered more from stress and fatigue compared with those who did not have similar caregiving responsibilities. Carers also had more difficulties in managing their work tasks and attending meetings and courses during and after working hours. They also experienced more difficulties in finding time for leisure. Women carers suffered more than men. These studies show that there is much need for flexible workplace practices to support work motivation and well-being of caregivers at work.

One of the purposes of this article is to find out about these workplace arrangements that are often referred to as 'family-friendly' arrangements or practices in the literature (OECD 2007). Family-friendly practices allow working parents with small children a better reconciliation of work and care commitments. In this chapter, these practices are explored in order to see to what extent they can benefit working carers in their efforts to combine care activities with their employment duties. We concentrate on working carers for older people who may be their own or in-law parents, their own spouses/partners or other ailing family members.

Research has shown that the role of a family carer affects women's work ability and career prospects more negatively than men's. Women more often than men report adjusting their work schedules, refusing new job offers and giving up full-time work to provide care (Anderson 2004; Neal and Hammer 2007; Szebehely et al. 2014). As the peak age range for involvement in family care is 45–64, these issues especially affect women in midlife. Many find themselves 'sandwiched' between multiple caregiving roles: they still have some responsibility for their own children and families, while simultaneously looking after an ageing parent or a spouse. In our survey study 15 % of working-aged carers were sandwiched between two caregiving roles when taking care for their old parents, spouses or other family members, and having school-aged children at home (Kauppinen and Silfver-Kuhalampi 2015).

The family carer role might come as an unwelcome issue to those women who are prepared to extend their careers in response to their evolving work roles, since today better education offers women improved job opportunities even in older age. Furthermore, by staying on at work longer, women can secure themselves better pensions and more satisfactory standards of living in later life. At an individual level, a conflict of interest might arise when facing the need to care for an ageing parent or disabled relative. Most studies, however, indicate that both men and women accept their caregiving duties quite willingly, as was evident in our study, where only a few survey participants regarded such duties as an unwelcome obligation (Kauppinen and Silfver-Kuhalampi 2015).

For a working carer, paid work can serve as a balancing factor, offering a respite from care demands and an arena for developing other skills (Eldh and Carlsson 2011). This is particularly important for working women. When work is well organised and satisfying, it can be a source of self-esteem and independence even at an older age (Doyal and Payne 2006). Therefore, more flexible working arrangements and support services are essential to keep people with caregiving responsibilities at work for longer. The World Bank Annual Report (2016) strongly urged companies to find better means to encourage women aged 55–64 to stay longer in employment in the ageing European population.

## Purpose of the Chapter

The purpose of our chapter is to study those work practices and arrangements that the caregivers find helpful when combining work and caregiving activities. Another issue is to find out how carers modify their work roles and tasks in order to cope with their family-related responsibilities. We also study how workplace atmosphere, experienced empathy and support can encourage carers in their working and caregiving roles. Furthermore, we explore those conflicts and frictions that emerge in the workplaces, and how they are resolved with a sensitive management policy and better workplace involvement.

## Methodology and Participants in the Study

We collected quantitative data for this study. Survey data was collected via an electronic questionnaire. The survey was distributed in collaboration with non-government organisations belonging to the Carers Network Finland; for example, the Finnish Red Cross, The Alzheimer Society of Finland and The Central Association for Carers in Finland. The link to the questionnaire was provided on the organisations' websites, Facebook groups and via email.

Altogether 435 working carers answered our questionnaire in 2014. For this chapter, only those who said they were caring for their own parents, in-laws, ailing spouses or other relatives who needed care and help were included.

The survey sample analysed for this article included 225 participants, of whom 89 % were women. The average age of the participants was 52 (standard deviation eight years); all of them were actively employed and family carers at the time of the survey. Altogether, 64 % were parent-carers, 25 % were partner-carers and 11 % cared for some other relative or close family member, such as an aunt, brother or sister.

The most common reasons for the need for care in the case of parents or in-laws were Alzheimer's or other memory diseases, or general frailty related to old age. The average age in this group was as high as 82 years. When the person cared for was the respondent's partner/spouse, the most common reasons for care were memory diseases, stroke, multiple sclerosis and Parkinson's disease. The average age of the partners cared for was 58 years. The group of other relatives included a variety of different illnesses or disabilities, and the average age was about 64 years.

To analyse the quantitative data we used percentages, Pearson correlation coefficients and analyses of variance.

## Results on Flexible Workplace Practices and Arrangements

One of our objectives was to find out about the work practices and arrangements that were available to the carers and how helpful they perceived them to be. To study these questions, we presented a concrete example for the survey participants to answer: 'What did you do when you were in an urgent situation, e.g., you had to take your ailing parent/partner to hospital or the doctor and you needed to take time off from your work?' A list of practices was presented based on previous research and knowledge. The participants were asked to select those practices, including daily flexibility, unpaid leave, work time bank, negotiations with the supervisor, teleworking, using holidays and working part-time, that they had used in this particular situation. The participants were further asked to write in an open space about their own experiences and describe the situation in more detail.

The results showed that half of the participants had used daily flexitime and/or unpaid leave. Flexitime was most commonly used by participants in workplaces with more than 250 employees. Daily flexibility allowed the carers to regulate their morning and evening hours more freely, which was highly appreciated by them. Unpaid leave was typically used by the participants when the care recipient—ailing parent or a sick partner—had to be taken to hospital and the care arrangements had to be solved. Usually, the unpaid leave lasted a few days, sometimes even longer.

Negotiations by telephone or face to face with the supervisor were also commonly used by the participants in these urgent situations. One third of the participants had negotiated with their supervisor about the length of the time off period and how it could be compensated.

One third of the participants had saved extra days from their annual leave schedule to be used in urgent situations, while some participants (12 %) had used the substitution of holiday bonuses, which gave them extra free days. In elderly care, urgent situations are often unpredictable, so the participants were prepared beforehand for these occasions by saving extra days from their annual leave schedules. This was typical for those participants (38 %) who lived far away from their parents or in-laws. In these situations, they needed extra time for travelling.

A work time bank was mostly used by participants in medium-sized workplaces with 50–249 employees and in large workplaces with more than 250 employees. One quarter of the carers working in semi-large or large organisations had benefited from the flexibility provided by the work time bank. Parent-carers (28 %) were the most frequent users of the work time bank, which usually allows flexibility in time schedules within three or four-week periods. The work time bank usually demands a system for recording working hours, which was prone to create positive as well as negative reactions in the participants. These reactions were registered in the participants' own comments and interviews. Some of the interviewees saw the recording system as a control instrument, while for some it provided better opportunities for time planning.

One fifth of the participants had part-time schedules, which usually meant either part-time on a daily basis (e.g. six hours per day), or a weekly arrangement so that one day was free, usually Monday or Friday. Part-time work in various versions was most typical in female-dominated workplaces, where it gave the carers a degree of daily or weekly flexibility. It mostly benefitted partner-carers (30 %). In workplaces, co-workers could also negotiate between themselves or within their teams about suitable working hours or shifts, which made the schedules even more tailor-made and fitted the often rapidly changing situations.

Teleworking was mentioned by a few participants (15 %). This was somewhat more often used by parent-carers (20 %). They usually lived far away from their parents, so they could occasionally work while staying with their parents and helping them. It is possible that teleworking in its various forms will become more common in the future with increased mobile technology and digitalisation.

Nearly all participants (95 %) had used at least one of the listed practices in a situation when they had to take their sick family member to hospital or the doctor and they had to take time off from work. It is characteristic in the Finnish workplace culture that arrangements are negotiated and accepted for use by both partners representing employer and employee organisations. This process makes practices available for all workers in a similar situation. This process aims to guarantee that the practices are not based on favouritism or good will by the employer/supervisor as was referred to earlier (Neal and Hammer 2007; Kauppinen 2010), but are made according to mutual agreement.

## Modifications at Work

The literature shows that carers make various modifications in their work roles in order to adapt their care activities to match job demands. According to research, carers, and particularly women carers, are reported to have more difficulties in concentrating on work tasks and they participate less in workplace events and training which may restrict their career opportunities (Anderson 2004). Research also proves that some women carers are pushed to work in lower level jobs in terms of their education when struggling to combine caregiving activities with their work duties. Many end up as underachievers in their work roles (Yeandle 2009). In order to study work-related modifications, we created a list of questions using items from a Swedish survey (Szebehely et al. 2014).

Our questions were of two types: First, we asked if the participants had refused new job offers, business trips or additional work hours because of care duties. Secondly, we asked whether the participants had experienced difficulties in fulfilling their work duties properly (e.g. working full time or participating in social events). These were dichotomised-questions with yes answers presented in Table 10.1. Two additional questions with Likert-type scales were presented: 'Have you had difficulties in concentrating on your work tasks because your care activities distract your attention?' and 'Have you felt you have neglected your care activities because of your work duties?' The results from the Likert scales are presented by summing together the answers 'occasionally', 'often' and 'very often' in Table 10.1.

The two most common modifications chosen by the participants were difficulties concentrating on work tasks and feeling they are neglecting care duties because of work. Of the parent-carers, 75 % considered that they experienced difficulties at least 'occasionally' in concentrating at work and felt they neglected their care responsibilities due to work

**Table 10.1** Modifications at work

| Participants | Partner-carers, *n* = 53–56 (%) | Parent-carers, *n* = 130–144 (%) | Carers for other family member, *n* = 20–24 (%) |
|---|---|---|---|
| Refusals from | | | |
| New job offers | 46 | 25 | 20 |
| Business trips | 56 | 36 | 41 |
| Additional work hours | 57 | 27 | 36 |
| Difficulties regarding | | | |
| Working properly | 41 | 43 | 38 |
| Participating in social events | 63 | 45 | 38 |
| Working full time | 39 | 15 | 36 |
| At least occasionally | | | |
| Difficulties in concentration on work tasks | 69 | 75 | 67 |
| Feelings of neglect of care duties because of work | 70 | 75 | 63 |

duties. Parent-carers were often ‘sandwiched’ between two care demands. They had young children at home and simultaneously provided care for their elderly parents/in-laws, who often lived far away and alone by themselves. The carers had to assist their parents/in-laws in many ways—arranging health care services and managing financial matters. In this role, they felt like ‘managers’ or spokespersons for their parents. Often these arrangements had to be done during working hours by telephone, which distracted their attention from work. Their work colleagues and team members were also affected by these arrangements and telephone calls. These disturbances were evidenced in the participants’ own comments and interviews. The managerial role of the caregivers was also mentioned in the Swedish survey; it was often burdensome for the carers and demanded a lot of time and organisational skills (Ulmanen 2015).

Other modifications mentioned by the participants were related to difficulties in attending social events at the workplace, particularly when the events were organised after work hours. The partner-carers were particularly affected: 63 % had difficulties attending work-related social events. Other modifications related to situations when the carer had to give up overtime or work-related/business travel. Again, the partner-carers were mostly affected, which points to the fact that their free time outside working hours is strictly controlled by home duties. They also found working full time more difficult, while 46 % had refused new job offers. These modifications have an impact on the caregivers’ career development and earnings, as noted earlier (e.g. Yeandle 2009). When all modifications were summed together, the partner-carers described more modifications than either the parent-carers or carers for other family members.

## Empathy and Support at Work

Workplace atmosphere and the quality of interaction between colleagues and the leadership are important regarding how well the work arrangements are put into practice and how colleagues react when sensitivity is needed. Most of our survey participants had told either their colleagues (82 %) or supervisor (73 %) of their caregiving duties. Some other studies indicate that is not always the case. According to a study carried out by Neal and Hammer (2007) about couples caring for ageing parents in the USA, it was shown that it was easier for the couples to speak about child-related issues at their workplaces than issues concerning the care of older people. Likewise it was easier to speak about family issues with one's colleagues than with a supervisor. Many worried that they may be stigmatised as 'problem' workers if they brought their care-related difficulties to the workplace. This is also related to the economic situation; studies indicate that when there are threats of personnel downsizing in the organisation, the employees are more hesitant about bringing their family issues into the workplace (Ambrose 2010).

Based on these studies, we asked our survey participants to evaluate their workplace atmosphere in terms of help and support. In the questionnaire, three questions were introduced as a measure of support and empathy in the workplace 'Do you get support and understanding from your colleagues concerning your care duties?' 'How satisfied are you with your workplace's arrangements concerning combining your work and care duties?' 'Is the leadership in your workplace interested in the personnel's health and well-being?' The participants answered these questions on a five-point scale—higher values indicating greater empathy and support. A sum variable was constructed based on these questions, which was referred to as 'Empathy and support in the workplace'. Cronbach's alpha was .75.

According to research, empathy and support are known as important resources for job satisfaction and work-related well-being. Support and friendliness in the workplace are positively related to job satisfaction and job engagement but negatively to burnout and stress, which is further related to increased pro-social behaviour (Hakanen et al. 2012.) Research also indicates that an empathic leadership style tends to increase work involvement and productivity in the workplace (Goleman 2006).

We explored how empathy and support were related to work practices and arrangements, which were analysed in earlier chapters. We used one-way ANOVA to compare the means of experienced empathy and support between those participants who had used certain flexible work practices and those who had not used them.

The results showed that those participants who used flexible work practices reported experiencing more empathy and support in the workplace. Statistically significant differences in empathy and support were found in the following five practices and arrangements between those who had used these arrangements compared with those who had not used them: daily flexitime, teleworking, work time bank, possibility to save holidays from annual leave schedule, and negotiations with one's supervisor about the arrangements.

Previous research has shown that flexible work practices are beneficial for both the employers and employees: employees using flexible work arrangements are more satisfied and have higher productivity than employees who do not work flexibly (Yeandle et al. 2006). Our results indicated a similar situation.

We also studied to what extent the empathy and support experienced in the workplace was related to job satisfaction and stress. In the questionnaire, we had a standard question: 'How satisfied are you with your job?' The question of stress was adopted from the Work and Health in Finland Survey and the participants were asked to respond to the following: 'Stress refers to a situation in which a person feels tense, restless, nervous, or anxious or he/she has trouble sleeping because things are constantly on their mind. Do you currently feel this type of stress?' Both questions have been used in the Work and Health in Finland Survey, and they have been found to be valid measures for the given concepts.

As expected, the empathy and support experienced at the workplace was related to high job satisfaction and lower levels of stress. The correlation between job satisfaction and empathy and support experienced was statistically very significant (.49***), while the correlation with stress was negative and statistically very significant (−.24***). The results proved that empathy and support in the workplace have positive implications for the well-being and job satisfaction among the carers, and it can be important in reducing stress.

Finally, we studied the use of telephone calls for care-related purposes and how the workplace atmosphere affected them. As discussed earlier, the interviews and survey results showed that colleagues often regarded care-related telephone calls as annoying, since they distracted attention from work tasks. The caregivers for their part felt guilty for causing these problems.

In the questionnaire we asked the participants: 'At your workplace or during your working hours, can you arrange things for the person you are caring for or speak with him/her on the phone?' The correlation between this question and the empathy and support experienced was statistically very significant (.35***), showing that in those workplaces where the empathy and support experienced was high, there were better opportunities to arrange care-related things and speak on the telephone during work hours than in workplaces which were lacking in sympathy and support.

Based on these results, we recommend that there should be 'a telephone etiquette' in workplaces for care-related purposes. Our survey showed that the participants regarded the telephone (land line or mobile) as the most useful technical apparatus for caregivers to keep in contact with the person they are caring for. Of all participants, 60 % regarded the telephone as the most suited for these situations. Other means of communication, such as Skype, email and Facebook, were seldom mentioned as useful, partly because the care recipients could not use them owing to their impaired health condition. Telephone was particularly useful for parent-carers who often arranged things for their parents/in-laws living far away and alone by themselves.

## Conclusion and Discussion

Ageing is a multi-dimensional process that affects everybody: individuals, families, workplaces and society at large. As the baby-boomer generation moves through the age pyramid, older cohorts are becoming more numerous than younger ones. This concerns Finland and many Western industrialized societies (World Bank Report 2016). There is much need for intergenerational support and interaction. In this article, we have shown that many adult children in Finland provide help and care for their ageing parents/in-laws even though they are not openly 'responsibilised' by law to do so. About one third of the working-aged women and men give regularly care and help to a person who needs help because of illness, disability or old age. In absolute numbers this accords to about 700,000 people.

As the peak age range for involvement in family care is typically 45–65, women in midlife are particularly affected by family caregiving duties.

The person for whom the care is mostly provided is their own or spouse's elderly parent, as stated in the OECD report (2011). Men start their care activity at an older age, when they are retired, and usually as caregivers for their ageing wife with a memory illness.

This was also reflected in our survey study with 225 working-aged participants of whom 89 % were women. The persons for whom the care was mostly provided were the caregivers' elderly parents/in laws (64 %), their own spouses (25 %) or other family members (11 %) such as a challenged grown-up child, an ailing aunt, sister or brother. In total, 15 % of the participants were 'sandwiched' between multiple caregiving roles; they still had responsibility for their children while simultaneously looking after an ageing parent or a sick spouse.

Our research showed that flexible work practices were helpful for the carers in combining working and caring. The best practices related to the following arrangements: daily flexitime, teleworking, work time bank, the possibility to save holidays from the annual leave schedule, and negotiations with one's supervisor about flexible arrangements. These practices benefit both employers and employees.

We recommend that there should be a 'telephone etiquette' at workplaces, which provides guidelines for using the telephone for care-related situations. Our survey showed that caregivers were often managing their caregiving duties during work hours using the telephone, which caused annoyance and conflicts in the workplace. A 'telephone etiquette' if properly drafted and accepted by the work community, can create a trusting atmosphere and ensure caregivers are not labelled as problem workers. These arrangements also benefit the parents of small children who often share the same problems as the family carers.

Our results proved that empathy and support are important workplace resources, which together with flexible work practices help caregivers combine their work roles with caregiving duties. In the workplace, empathy and support can activate a positive spiral that encourages work colleagues and team leaders to show sensitivity and respect, which in turn increases prosocial behaviour and effectiveness. Research indicates that empathy and sensitivity can be strengthened in the workplace through learning and training which enrich both the leadership style and work community as a whole (CoPassion 2016). These learning and training sessions should be organised in workplaces.

While writing this article in the spring of 2017, the Finnish government is emphasising the role of family care in the care of older people. The goal is to minimise institutionalised care and build care services, which are brought to the home. It is often the wish of older people to stay at home as long as possible. However, as their age increases, more regular and personal help is needed. Even today most of the people diagnosed with dementia are helped and cared for at home by a family member, typically by an adult child, usually a daughter, a spouse or other relative. However, as the numbers of ageing people are increasing, other care facilities will have to be built in the coming years; the care for elderly and frail people should not be left solely to family members. This is also according to the basic character of the Nordic welfare society.

It is also becoming better acknowledged in Finland that there is a need for more formal solutions, based on legislation, for combining working and family caring, which complement existing 'family-friendly' practices. Balancing work and family care is not restricted to the family situation when the children are small, but is a lifelong issue. At each stage, women's working opportunities need to be secured.

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# 11

# Career, Care, and Time: Female Top Managers in the Intersections of Age, Gender, and Work–Family

Marjut Jyrkinen, Charlotta Niemistö, and Jeff Hearn

## Introduction

The focus of this chapter is on the intersections of age, gender, and work–family relations, and how these intersections relate to careers, care and the structuring of time more generally in the lives of women in high

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managerial positions.[1] Age, age-related issues and their intersections with other social divisions are central in working life, and in how work, careers and organisations in and around work are constructed. Yet they still remain relatively neglected in studies of work, and even more so in studies of organisations (Niemistö et al. 2016). Age, as biological or chronological, or indeed social, is something everyone seems to 'possess', but the social experience and perception of age is constantly changing and intersecting with other social divisions and experiences. Age has also been analysed as cognitive age based on subjective feelings of age (Barak and Schiffman 1980) or as socially constructed cultural age that impacts on consuming and marketing (Suokannas 2008). Fineman argues (2011: 2) that age is an essential element and dimension of organising, even a powerful 'master discourse'. Moore (2009: 656) highlights that age is socially, historically and culturally specific and impacts on (older) women's working life experiences and career development.

The intersection of age and care can be significant in the construction of shifting life situations and life stages, and their understanding. The gendering of care also means that these situations and stages are often doubly anchored in the experience of both work (as career stage) and home in the lives of women, both on a day-to-day basis and over the lifecourse. More specifically, in this chapter we address how female top managers experience different life stages through time and care demands in their aged and gendered career phases. The trends towards and culture of long-hours, 'presenteeism' (Cooper 1998), demanding and 'greedy' organisations (Coser 1974) and relative inflexible work patterns are all crucial parts of the dominant Western(ised) or globalised work culture in managerial positions.

Furthermore, the well-established, and still persisting, career models of management positions are built on (masculine) assumptions of an 'ideal worker' or 'ideal manager' (Whyte 1956; Kanter 1977; Acker 1990; Collinson and Hearn 1994; Wajcman 1998; Williams 2000; Tienari et al. 2010). This can easily negatively affect the career development of women, in part because of these perceptions, but also because women still take care of the majority of care responsibilities in households (Hearn et al. 2008; Hearn and Niemistö 2012; Jyrkinen and McKie 2012).[2] For example, according to a large study by Statistics Finland 2009–2010 on time used for work and housework in Finland, a country ranked as less gender unequal than most, women's whole working hours (work and housework) per week was 41 hours, and that of men 38 hours. Women use 3.5 hours and men 2.5 hours per day for housework; women in particular for care of children, cooking and dishes and washing (68 %); men for maintenance and repair at home (63 %) (Pääkkönen 2013). Significant greater gender differences are to be found elsewhere in many European countries (*The Role of Men in Gender Equality* 2013). The nature of the support of the possible partner and other family members, as well as various close friends, is still key to women in management positions (Heikkinen 2015; Heikkinen et al. 2014). It is in this social context that we are interested in how women in top management experience their work and 'non-work' in their careers, and the blurring of the boundaries between work and non-work through variable gendered control of time and care responsibilities.

In making sense of the individual stories of female managers and the emerging patterns across countries, we have found it useful to locate their managerial careers as embedded within several broad social fields or 'scapes'. Thus the analysis of individual women's managerial experiences of work and life builds on theoretical frameworks of scapes, as developed by Arjun Appadurai (1996) to grasp the new global cultural economy. Such 'scapes' (emphasising fluidity of and across spaces) include ethnoscapes, technoscapes, financescapes, ideoscapes and mediascapes. In this paper, we focus on three further scapes, namely careerscapes, organisational carescapes and timescapes, which we now introduce.

## Career and Careerscapes

Conceptualisations of career have often been limited in their assumptions about work, gender and time (Hearn 1977). The linear, strongly upwards directing and uninterrupted career model has been widely criticised by gender scholars, partly because many women's career paths do not often follow this pattern (see Hall 2002; Mainiero and Sullivan 2005; Burke 2007). Cohen et al. (2004, p. 409) assert that:

> a career is not conceptualised as a form or structure that an individual temporarily inhabits, constraining or enabling her in her journey. Rather, it is constituted by the actor herself, in interaction with others, as she moves

> through time and space. However, this is not to suggest that individuals have a free rein as to how they enact their careers … It is an iterative and on-going process, involving at times the reproduction of existing structures and at times their transformation.

Careers, in this context women's careers, can be usefully elucidated through the concept of 'careerscapes' (McKie et al. 2013). Careerscapes refer to changing landscapes of women's careers through time and different responsibilities of care; the concept of careerscapes highlights broad temporal and spatial dimensions, patterns and rhythms in women's careers. It offers an analytical framework to examine gendered structures and processes in people's lives, and how people move through these experiences, drawing upon memories, experiences and speculations about working life and work–life interfaces. These are not linear processes, but multi-faceted and interlinked to rhythms of personal, family and care dimensions that change with age. Careerscapes build on the understanding that our imaginary landscapes are, above all, gendered, but also permeated with other differences and inequalities including social class, ethnicity and age.

## Care and Organisation Carescapes

Care is highly gendered (Tronto 1993; McKie et al. 2008). As already mentioned, women still carry the majority of care responsibilities in households. Although women in top positions tend to have fewer children than their male counterparts (Hearn et al. 2008), they easily carry the 'double-burden' (see, for instance, Still and Timms 1998; Bittman and Wajcman 2000), as they in different life stages care for children but also for their own parents and those of the spouse, maybe even other elderly relatives, friends, own spouse and grandchildren.

The social relations of care, home and work represent some of the most fundamental aspects of gender relations in the society (Orloff 1993). There is often a gap between research on macro-level policies for work and care, and policies and practices at the organisational level (Lewis 2006: 387). Even if our study does not include an analysis of 'contrasts of contexts' (Esping-Andersen 2009), we acknowledge some differences in care ideologies between the (Western) countries that our case respondents come from, and these affect the way individual women and men perceive their ability to 'do gender' in their careers and at home. In examining these issues, 'organisation carescapes' is an analytical tool for 'the identification and critical exploration of the topic of 'care' in a range of work place and related contexts' (McKie et al. 2008: 8). Within different organisation carescapes there are multiple and multi-faceted ways in which employee policies and practices can support and/or control workers.

### Time and Timescapes

There are many forms of time and temporal forms: time ticks remorselessly for us all, every day and through every moment. Time passes by, and at times one might feel that issues in the past should have been done differently, or one should have done more. What do I do at the moment—and should I be doing something else? Time is precious, and in some senses limited. Time is central in the intersections of work and non-work, as well as in the balancing act between these spheres, still often presented as separate from each other (Nippert-Eng 1996). Often, discourses around the balancing act are gender-blind, and construct it as taking place at the individual level, focusing on 'individual choice' to allocate time and effort from work to something else, such as care responsibilities or 'life' in general, and thus neglecting gendered and other organisational constraints (Lewis 2006: 363–366). The concept of 'timescapes' (Adam 1998) broadens common understandings of time as linear, clock-time and calendar time towards the time experienced when we reflect on past, present and future at one and the same time; our time perspectives are gendered and marked by, amongst other things, our age, relationship, familial status, and social situation and characteristics.

## Method

Our data consists of eight interviews with women in top management positions in Australia, Finland, Ireland and the UK/Scotland.[3] Our sample is gathered from three different data sets from research projects that examined the work–life balance of knowledge workers and managers in large business-to-business (B2B) organisations,[4] work/family reconciliation policies in organisations,[5] and age and gender in female managers' careers.[6] We revisit these data sets of interview data in order to examine the perceptions of care responsibilities, as well as aged/gendered managerial work in the context of work/non-work and long-term career prospects. The interviews have included very similar themes, yet the exact questions have been somewhat different. When choosing to include cases from different countries, our aim has not been to do a comparison between the countries, but rather to elaborate the chosen data—eight case studies—through existing knowledge on gender and leadership. We introduce these women more in detail in Table 11.1. All the names are pseudonyms.

The eight interviewees cover different ages/generations of female managers: in their 30s, 40s, 50s and 60s.We have chosen two female top managers from each age/generation group, and these 'pairs' are always from different countries. The work they do is relatively similar—managing and leading as knowledge intensive work—although the sectors of their work vary from service sector to accounting, banking and B2B. We wanted to include women with no children and up to even three children, the latter which is relatively atypical for female managers in any country. We develop our method of analysis from earlier work (Jyrkinen and McKie 2012) using Crompton's (2001) approach to comparative research with biographical matching. Instead of generalisations on, or even stereotyping of, countries, their legislation, policies and 'contrasts of contexts'

**Table 11.1** Interviewees

| Name | Country | Position | Age | Marital status |
|---|---|---|---|---|
| Rose | Scotland/UK | Senior manager in business | 30s | Married |
| Cecilia | Finland | HR manager in business | 30s | Co-habiting |
| Diane | Ireland | Senior manager in business | 40s | Married |
| Emma | Australia | Top manager in business | 40s | Married |
| Bridget | UK | Top manager in business | 50s | Co-habiting |
| Fiona | Finland | Top manager in business | 50s | Married |
| Melanie | Scotland/UK | Top manager; CEO of NGO, earlier in business | 60s | Single (divorced) |
| Patricia | Finland | Manager of own business; ex-leader of a company | 60s | (Re)married |

(Esping-Andersen 2009), we consider the similarities between women in top management through their individual stories. We focus our analysis on the hurdles and opportunities, seen within the contexts of power relations that are embedded in the lives and careers of the interviewees, with examinations of first age, careers and care; and then the relations of time, work and 'non-work'.

## Care, Careers, and Age

Issues around age, time and care are much present in female managers' everyday life as well as in their actual working life activities and duties. Women in top managerial jobs tend to have fewer children than their male colleagues. For instance, in a study on female and male top managers by Hearn et al. (2008) men had 'average sized' families or bigger families. In that Finnish study where most worked in international companies, male top managers often had 'housewives' or their spouses worked only part-time (Hearn et al. 2016). The situation was the same for male top managers in the project examining work–life balance of knowledge workers and managers in large B2B organisations, from which some data is used in this chapter (ibid.). Female top managers were more often single or divorced and had often only one child or no children (Hearn et al. 2008). Interestingly, in our dataset, we have female managers with more than one child – two of eight respondents had three children, which can be considered a fairly large family. On the other hand, the female top managers in our data that had children also had, at least a relatively supportive, spouse, even if the spouses also pursue a career. Thus, these women could be thought of as 'mother-managers', with particular responsibilities and demands, in something of a contrast to 'father managers' who tend not to participate much in care (Hearn and Niemistö 2012).

The female managers interviewed told us about day-to-day scheduling, but also about their planning for a longer-term career steps that often interlinked with aspects of care. Timing is key in both. For example, in an Irish dual-career family, day-to-day balancing was resolved by dividing parental shifts with children and having a nanny. This meant that the mother, Diane, a top manager in her 40s, left to work early, before the children woke up. The father ate breakfast with them, but he came home late in the evening, after the children had gone to bed. Diane came home from work in time to spend a couple of hours with the children, and continued working after the children had gone to sleep. "I'll be a mom for a few hours", she said.

Care responsibilities can often lead to situations when one needs to work in evenings and at weekends. Female managers with children often have their share of care work and they might, for example, need to pick up their children from day-care at a certain time but then continue working again later in the evening as well as putting in hours from weekends, holidays and other supposedly leisure times. This juggling with time between care and work is relatively present in our data set. A Finnish top manager, Fiona, reflected back upon a time when her children were small, some 15–20 years ago. In order to leave work early enough to pick them up from day-care and spend time with them, she needed to work evenings and weekends to 'keep up' and avoid being 'mummy tracked' (Benschop and Doorewaard 1998). She explained that she needed to work extra hard not to give anyone any excuses to not consider her 'manager material'. Fiona justified her way of living up less to the dominant corporate 'presenteeism' (Cooper 1998) by stating: 'Surely, surely I did as much as they did.' And, finally, she did end up being a top manager, with two adult children today.

Care responsibilities do not really end after the few first years of a child; children grow older but they still need care and attention, something that takes time every day. Special situations, such as illness or a crisis of some kind, can happen at any time, both for young children and little older ones. And other close ones grow older and might need more care and attention. For instance, the Finnish care leave system is relatively well developed in comparison to the other countries represented in our study. However, the Finnish system concentrates on the very first years of a child. These parental leaves are stipulated in the national legislation, which has led to work organisations being relatively passive and reactive in creating organisation-level flexibilities for employees in later work–care reconciliation needs of different kinds (Niemistö 2011).

Timing is not limited only to the work tasks and duties. If and when to have children and raise a family is a major issue, as Diane stated:

> So they make it to partner [in the company] when they're maybe 30, and then they have their children. I didn't. I had all my children first, and then I came back in, and now I'm looking to make it to partnership and now I'm finding it very difficult and I'm competing against 30-year-old men, for the same job. So it's very different [*laugh*] (…) It's interesting 'cause I think that it's easier to be successful before you have children. So I think if I was to look back again, at when I was 21, I would say I should have, if you're very ambitious and you want to get to the top, I would say you have to work really really really hard, as fast as you can, and wait to have your children, and then have your children, then you stay on the platform. For a while, until you get your feet, and until you're ready to take off again … (Diane, 40s, Ireland)

Being pressed with time while balancing between care and career can also lead to physical and mental symptoms. Our Australian respondent, Emma, was in her 40s and had one child. She worked in the highest management level in a big knowledge-intensive business, and had struggled with severe symptoms of burnout especially in the phases when her career development intensified and she climbed up into the highest managerial ladder. To her disappointment, Emma then found out how the hierarchies also on the top took place. She felt difficult to impact on issues that she felt important: 'I am a tiny little flea on the back of a beast.' She wanted to make a change in her stressful and time-consuming career phase, but for economic reasons she felt that it was not possible yet.

> Four years from now, because when I, in four years' time my daughter will finish school, and so, (since), (…) then my financial obligations, 'cause she goes to an expensive school, (will) (…), and so then I have bandwidth to make different financial decisions. (Emma, 40s, Australia)

In Emma's case, her careerscape had shifted from earlier smaller business leadership to a more intensive phase, which she found relatively frustrating and too stressful. But, as she had financial obligations because of her daughter's schooling, she planned to make the change in her career after a couple of years. Thus her caring responsibilities impacted strongly on her own career, even on her own well-being. Emma suffered even from physical symptoms caused by stress: she stated that she survived burnout, at least for a moment, through taking time for a holiday.

> Now it is chronic stress, but at that moment it was at a peak. (…) I'm just keeping my head above water, I don't have an appetite to change the system, and I don't, I see limited capacity to do so. (…) Changing the structure of work, (…) (a bit), there's nothing I can do now to change the target that I haven't already done. I've already changed, don't pay me any more, here's my target. But now I just have to meet that target, and the only way to meet that target is to be very focused and, very, on the whole time. (Emma, 40s, Australia)

Ageing of parents and other significant people brought care responsibilities for many women's careerscapes in our data. A Scottish interviewee Rose, who was in her 30s, married but without children, took up the care responsibilities of elderly family members in working life contexts:

> I think that considering equal responsibilities, it is much more appropriate to be flexible if you have children than if you have elderly [family members]. (...) And I think it is part of ageism in society. We have the disregard for older people, which is unpleasant actually. (Rose, 30s, Scotland)

Rose highlighted the question of care of elderly family members, which is often not visibly present in organisations as day-to-day practices and employees' need for flexibilities more than established formal policies allow. Our sample's second interviewee in her 30s, Cecilia, dramatically just before the interview had received serious news on her father who had a major attack of illness and was in hospital in intensive care. Cecilia was understandably very upset, but had decided to continue working, as she, on one hand, felt that there was not much that she could do for her father at the moment, and, on the other hand, was uncomfortable not being present in her workplace. In fact, Cecilia was very thankful to the chief executive officer (CEO) for his positive attitude towards her visits to the intensive care—with visits of a maximum of 15 minutes—during the afternoons.

> At the moment he is lying there [in intensive care]. We have such a lovely CEO that I have now agreed with him that I can visit there during the afternoons. … They said [in the hospital] that this is a long process, perhaps

> within a year we will know the end results if he survives that long. Thus these [issues on care of elderly] can be very timely, and that my care help will be needed more and more. (Cecilia, 30s, Finland)

Cecilia's gratefulness to the CEO who allowed her to visit her father brings up the same aspects that Rose talked about: there are hierarchies also for whom care is allowed to be given during one's working life. It seems that work–life relations are—somewhat and hopefully increasingly—addressed in organisational level policies and practices when it is about small children. But there are (even) bigger omissions when the question of care needs is outside the 'nuclear family', such as parents or relatives.

A Finnish interviewee, Patricia who is in her 60s, also took up the question of care responsibilities that have impacted on her career in many phases. She said that when her parents were still alive, she needed to travel a lot to another city where they lived. In particular when her mother lived for five years alone, Patricia needed to put a lot of priority on her care. Another aspect of care that Patricia needed to balance her working life with was care of her adult son, who had been seriously injured a few years ago and constantly required a lot of attention:

> When my son was seriously injured [specification of the injury], there is a need to monitor his interests, whether be those issues related to medical care or aspects of social security. (Patricia, 60s, Finland)

Care takes place also within organisations. Often women are also seen as natural caretakers within organisational life (Acker 1990; Hiillos 2004). This can mean a gendered division of labour within the organisation, or more informally, taking care of other, often younger or more junior, employees. Diane gave an example of this by talking about her availability even during holidays. For her, it was an unbearable thought that junior employees would feel stressed or uncertain while she was relaxing on vacation. She said:

> They get nurtured and cared for a lot more [by me], yeah. I don't know if that's the mother in me or female or just innate, but yeah, that's not the culture. (Diane, 40s, Ireland)

For the female top managers, time and timing are much of the personal everyday struggle, which is embedded with 'caring' functions that can differ from those of men in corresponding positions. Gendered care outreaches often other family members and relatives from both sides of the relationship. This was the case also with Diane. After living and making a career abroad, Diane and her family returned home after her mother-in-law became terminally ill.

From the examples above, we can see how, at different times, different care needs restrict and affect women's careerscapes, their choices, advancements and the very concrete use of their time on a day-to-day basis. On the other hand, when the care needs shift, these women have developed their careers further and actually reached the top positions, in spite of care responsibilities at certain times of their lives. In the lives of our respondents, care and careers have been temporarily intertwined in interesting and multi-faceted ways.

## Time, Work, and 'Non-work Life'

The use of time for work in top management raises other questions than those specifically related to care. What counts as work itself is a core question with embedded gender dimensions. This is not only a matter of paid versus unpaid work, but also what counts as work within employed work settings, managerial or otherwise. Patricia Yancey Martin, in her study on gendering practices and practising of gender at work, claims that 'men's superior power lets them claim that whatever they do is work', whereas women with less power are discouraged to challenge this (Martin 2003, p. 257). Martin continues (p. 258):

> Ironically, men in my study engaged in practices that are routinely attributed (as stereotypes) to women more than men—wasting time talking to coworkers, pretending to like people they dislike, making decisions based on affect rather than "objective" evidence, and ignoring rules in favor of particularistic sentiments. Such behavior is criticized when done by women. For women workers to interpret men's similar behavior as evidence that men "act like women," or practice femininities, is likely too

heretical a notion for women to even consider. When women coworkers socialize, they waste time; when men coworkers socialize, they advance their careers (Lipman-Blumen 1976).

Time used for socialising—such as wining and dining of customers—can be evaluated as important, but caring-related communications—such as listening to a stressed colleague—might not have a similar kind of 'strategic value' in organisations. In Martin's (2001) research, (some) men had a tendency to prolong meetings to 'peacock' or to build up friendship and alliances with other men. Thus women felt frustrated and did not want to waste time with these kinds of activities at work, but instead were keen to accomplish their work tasks as quickly as possible. Socialising after work can increase collegiality, but demands offering one's leisure time. It is obviously possible that in more informal get-togethers with colleagues and customers contacts and networks are built up. At the same time this enhances the aspects of homosociality in business (Lipman-Blumen 1976; Holgersson 2003). The issue of 'being present', though not in terms of building up the necessary homosocial linkages and the understanding of the time and career possibilities, was brought up by the British interviewee Bridget in her 50s:

> [*laughs*] No, it's not equal. It's, and you still see, people making hiring and promotion decisions, in their own image. Not saying these are bad people. And I'm sure they don't even recognise what they're doing but there is an unconscious bias, towards promoting or recruiting in your own image. Because it feels comfortable. There's also an unconscious bias in terms of, giving people opportunities in the business. Stretch opportunities. […] Especially in urgent matters that you need to [react] really quickly. The human nature kicks in and it's easier to reach for, the people that you've worked with time and time again. To deploy quickly. Rather than to think, well hang on a minute, do I need a better balance in the team than I've currently got and, let me pause and think about people that I perhaps haven't worked with. And they will often be women. Who will be sitting on the sidelines, and thinking, oh my goodness, 'Fred'" got another one of these opportunities, what am I doing wrong that I'm not getting any of these opportunities? It's definitely not a level playing field. (Bridget, 50s, UK)

Time is precious and the sacrifices for career advancement are many. Bridget continued:

> Definitely [need to do sacrifices]. Everything from, interrupted holidays, cancelled holidays. Through to … cancelled concerts or theatre tickets or that sort of thing. Yeah definitely there's been sacrifices. And those are sacrifices that we have both, both my partner and I have had to make. (Bridget, 50s, UK)

Diane also talked openly about the sacrifices she made in favour of work and, however lightly presented, how this affects her marriage:

> I don't switch off during my holiday which is a problem. No, I'm on my email and my phone all the time on holidays. It's grounds for divorce [*laugh*]. (Diane, 40s, Ireland)

The second Scottish interviewee, Melanie, a top manager in her 60s, pondered on her previous position in a business organisation and how it compared with her current job. She felt that in her earlier job she did not have any other life than work, and now the current work still has a tendency to be a bit similar:

> I was going to be back to strategic decision, you know, policy, managing people and I really had to ask myself, do I want to do that. Because my role in the [company] naturally was really, really stressful … And I remember [thinking about] that I would leave the [company] as much as I loved, I loved working for the [company], but I had no life outside … I was working seven days a week, I was working on evenings … And I said to myself, what am I doing, what has my life become? (Melanie, 60s, Scotland)

Melanie continued about time that she spent to support her junior staff members, which she found to be important but also bringing a lot of satisfaction:

> People need support, [and] if you dare to support then they are going to be there for you and they will give you more than just an obedience. (…) If I

can help you with that problem you've got at home by taking some pressure off you. It is not always possible, but even just to know that if you need some time off that's fine, you can do that in confidence. Just finding ways to help people, because we have all got personal situations that we'll have to deal. (Melanie, 60s, Scotland)

Patricia also brought up the importance of support of younger generation women, as she had noticed how easily one 'hits one's head on the glass ceiling'. Patricia, who had had many positions on corporate boards, took up the perspective of time and changes over time. She had given up from many positions in order to give space for younger talented people, but also to move on to other aspects of life in her current career phase.

> Even though it is a relief to leave some tasks behind you, on the other hand one would never give up the experiences. And I find it extremely educating that one learns to give up some tasks, because when one has gotten used to use power and carry the responsibilities that are linked to it, then one needs to remember that hold on, this is not my position any more. Do not interfere too much, let people do their job in peace. (Patricia, 60s, Finland)

At the same time, younger female managers appreciated the time and support from their more senior colleagues or mentors. Rose explained enthusiastically about the motivation and knowledge creation that she had experienced to gain from networking with older women:

> And what I enjoy is having access to older women in a network, because a lot of these women have children, but their children are older so they are not encountering those burdens of responsibility of looking after young children. And they've got experience of balancing their work and their life. They've had families, they are older now and they've got the business experience. (…) Women who are a bit older and families are grown out, it is much more of what they can give and what they give back. (Rose, 30s, Scotland)

For Cecilia female mentors and senior colleagues had offered priceless support during her career:

Cecilia: I have gotten support from these colleagues, and I have to say that through their help I have been able to proceed to where I am now.

Interviewer: Have they been like mentors to you, unofficial or official?

Cecilia: Yes, mentor is a good word, and I just thought that there have been several during this journey. I had one person in [earlier job] and she has been certainly the most important mentor during four to five years. But there are also others who have been important to enable place for discussions and getting to know better what the tasks include, what is required and if one is read to move on to such positions. (…) They have been all older [women], each and every one, between 50 to 60 years of age. (Cecilia, 30s, Finland)

To summarise, time is certainly precious for female top managers because of the manifold caring roles at work and at home. In our eight interviews, women told about their multi-faceted care roles that changed in different phases of their careers. Thus the careerscapes of these top managerial women are fluid, and reflect not only their own ambitions and wishes, but also often their family and non-work situations. In particular younger female managers appreciated highly the support and advice from other more senior women through difficult times. On the other hand, women in more senior career phases were keen to support others, and at the same time there was a realisation that the passing of power and responsibility to others enables new paths of life for oneself and possibilities for more junior women.

## Discussion

In this chapter we have highlighted some key intersections of age, gender and work/family relations, in relation to care, careers and the structuring of time more generally for women in high managerial positions. In spite of different contexts, nationalities and ethnicities, the striking similarity in our data is the interconnections of careers, life stages, care demands and time. The following features were represented in the women's accounts as interconnecting with being in a top management position:

- the demanding responsibilities of management;
- limited control of one's own time;
- experience of lack of time for the work itself;
- fear of not keeping up with others;
- lack of time for life outside work;
- care responsibilities as a central part of life at different times and life stages.

All of these processes have taken place across time, throughout the years, while climbing the corporate ladder, and indeed with ageing and changing age positionings. On the other hand, these women have also experienced strong societal demands and expectations related to the gendered views on aged womanhood, motherhood and care, and have also experienced the pressure from care demands outside work—sometimes strongly affecting their career choices or life choices. Care, often invisibly, takes substantial chunks of time. This makes a combination, which adds to the workload and invisible stressing factors for many female top managers.

The interconnections of work and care can be understood and organised very differently, depending on the societal and organisational contexts, macro-level care ideologies and welfare systems, and gender contracts. Therefore, it is crucial also to address organisational level policies and practices of more formal care responsibilities as well as the informal caring roles undertaken by many women. This can be seen as broader landscapes of care taking place both inside and outside the organisation, as organisation carescapes and also in individuals' relations to care.

The shifting times and places for care partly define and partly depend on the careers of women. Societal expectations targeted towards women still expect them to carry the main responsibilities for care, even with significant variations in collective provision, time use and everyday practice across countries. On the other hand, the women studied have all accomplished a very successful career. The shifting times of intense care responsibilities and devoted career developments appear to construct the life stages of these women, for some with the double demands of teenager children and ageing parents. Despite critiques of the notion and content of given 'life stages', in our data the life stages do not seem to depend so much on context, but seem to follow similar kinds of paths in the different countries, through the interrelations of careerscapes, carescapes and timescapes.

These questions and analyses are important for both theory and practice in at least five main ways. First, they add to our knowledge of how gendered age and aged gender affect organisations and organisational structures, processes and experiences. Second, they address the intersections of age, work–life, care and careers of female managers, actual and potential. Third, these intersections affect how differently aged groups of managers, in the pipeline for management positions, perceive their career prospects, and on the other hand family prospects, as well as questions around work/family reconciliation. Fourth, intersections of age and gender themselves impact on how the care responsibilities for older people in working life are encountered, or avoided. Fifth, these questions closely relate to individual life stages and phases of career and care responsibilities, as well as the aged/gendered societal and organisational expectations of the 'ideal worker', the 'ideal carer' and the 'ideal manager'. More broadly still, we see these matters as part of the development of theory and theorising on intersectional gender relations in and around organisations. In many instances, the current tendencies towards intersectional orientation in organisational theory, policy and practice has been focused on class, ethnicity, gender and racialisation, and much less on age, ageing and generation, let alone disability.

## Notes

1. This paper has been developed in the WeAll research project (No. 292883) which is funded by the Strategic Research Council at the Academy of Finland.
2. We are aware that the categories of 'woman' and 'man' have their limitations—further genders exist too. The chapter does not address questions of sexuality and heteronormativity (for instance, Butler 1990). Moreover,

'leadership' and 'top management', at least in the country contexts studied, often embed whiteness and a particular (Western) tone. Intersectionality (e.g. McCall 2005) of age, gender, ethnicity, social class and other social categories and positions is increasingly relevant in research on work, organisations and management and leadership. In building up our argument(s) and analysis, we have kept in mind these issues implicitly, and sometimes explicitly, although these are not the main focus of this chapter.
3. All interviewees were aware of the purpose of the interview and that their comments would be published. Pseudonyms have been used throughout the chapter to disguise their identities.
4. The data is from the project Age, Generation, and Changing Work-Life Balance and Boundaries: An Intersectional and Interactive Ethnographic Study, 2012–2014, led by Jeff Hearn and funded by the Academy of Finland. The data was gathered by postdoctoral researchers Charlotta Niemistö and Mira Karjalainen.
5. The data was gathered in 2009 by Charlotta Niemistö (2011) for her doctoral dissertation.
6. The data is from Marjut Jyrkinen's Academy of Finland funded postdoctoral research 2008–2010 that examined the impact of gender and age in women managers' careers.

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# Section 5

## Age at the Boundaries

# 12

# Opportunity- and Necessity-Driven Self-Employment Among Older People in Finland

Hannu Tervo and Mika Haapanen

## Introduction

In many developed countries, the workforce is ageing but is still needed for productive work. Entrepreneurship is an opportunity for many older individuals as either a career option or a form of partial retirement. Self-employment allows workers the freedom to adjust their working hours, which is an advantage for many older full-time workers. However, older individuals may also be pushed into self-employment in the absence of alternatives. While pull motives are considered positive, push factors often have negative connotations (Kirkwood 2009; Dawson and Henley 2012). Interestingly, sociological theories suggest that low-wage workers are pushed into entrepreneurship, whereas high-wage workers are pulled into entrepreneurship by attractive opportunities (Clain 2000). The push–pull dichotomy is perhaps over simplistic (Williams 2007)[1];

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however, this dichotomy is useful in categorizing background motives, especially because of the lack of comprehensive theory on the issue of necessity and opportunity entrepreneurship.

In the literature, the existing research on the necessity-push versus opportunity-pull debate has not provided conclusive answers. Do market pull, higher expected earnings, the promise of independence, flexibility and opportunities, and the fulfillment of lifelong dreams dominate, or are individuals pushed into entrepreneurship because of reduced income or simply because nothing else is available? In his review, Parker (2004) concluded that overall the econometric evidence from cross-sectional studies supports the prosperity-pull hypothesis, while time-series and panel data evidence mostly support the recession-push hypothesis (see also Parker 2009). However, recent cross-sectional evidence based mostly on the analysis of transitions into entrepreneurship from unemployment lends more support to the role of push factors (e.g. Earle and Sakova 2000; Moore and Mueller 2002; Ritsilä and Tervo 2002; Tervo 2006; Niefert 2010; Brünjes and Diez 2013).

The results of Global Entrepreneurship Monitor (GEM) research show that necessity as a primary entrepreneurial motive is low in Finland, whereas a relatively large share of individuals also possesses the motives of both opportunity and necessity (Heinonen et al. 2006). Similarly, Giacomin et al. (2011) showed that there are diverse necessity and opportunity entrepreneurial dynamics and that these two dynamics can combine within the same individual. Their results suggested that young people in particular can be driven in their entrepreneurial motivation by both necessity and opportunity dynamics: they can simultaneously search for social recognition and profit and a need for independence. In contrast, older jobseekers were found to be driven solely by a “get out of unemployment” entrepreneurial dynamic and, thus, by necessity, entrepreneurship (Giacomin et al. 2011).

Related to age, van Praag and van Opheim (1995) found that the opportunity to become self-employed was significantly higher for older than for younger Americans; however, older workers were less willing to become self-employed than younger workers. Thus, age may have different effects on the willingness and opportunity to become self-employed.

Empirical results have shown both positive (Reynolds et al. 2002) and negative (Block and Wagner 2010; Robichaud et al. 2010; Giacomin et al. 2011) relationships between age and opportunity entrepreneurship, while in Bergman and Stenberg (2007), age did not have an impact on the probability of necessity entrepreneurship. Therefore, further research is needed to fully understand the relationship between age and opportunity versus necessity entrepreneurship.

Why would someone on the verge of retirement start a business? Transitions to self-employment in later life may be either a career option or a step toward retirement, known as "bridge employment." Bridge employment is part-time or short-duration employment that occurs in the gap between career employment and complete retirement (Ruhm 1990; Quinn 2002). To date, few empirical studies have attempted to highlight the impact of socio-economic characteristics of older entrepreneurs on their positioning in terms of necessity or opportunity entrepreneurship (see, however, Block and Wagner 2010; Kautonen et al. 2011, Heimonen 2013). By interviewing nascent entrepreneurs aged between 50 and 64 years, Heimonen (2013) concluded that both pull and push factors simultaneously influence becoming an entrepreneur in Finland. According to these results, the building blocks of entrepreneurship in older age are life and work experience, longitudinally developed know-how, personal networks, flexibility, and current personal life situations. On the contrary, small pensions and the threat of losing one's job or unemployment benefits were on the push side.

Many of the earlier studies are based on small samples and interviews. Utilizing large register-based data on all Finns, the aim of this explorative study is to obtain an understanding of what motivates older individuals to switch into self-employment in Finland. For this purpose, profiles of necessity and opportunity entrepreneurs in terms of personal, family, and environmental characteristics are developed based on empirical analyses. This chapter aspires to contribute to the economics of ageing by showing that opportunity and necessity senior entrepreneurship differ in terms of socio-economic characteristics.

## Push and Pull Motivations Among Older People

Lévesque and Minniti (2006) presented a theoretical model in which ageing individuals have an incentive to reallocate more of their time to waged labor and less to starting a new firm. According to this model, the willingness to invest time in starting new firms among older people declines because the opportunity costs of starting a new firm increase. If an individual is employed in waged work, (s)he receives income at the time in which (s)he performs that activity. If an individual allocates time to starting a new firm, instead, (s)he does not receive income instantaneously but rather receives a stream of future returns. Therefore, in the model by Lévesque and Minniti (2006), an age effect reduces the relative return to entrepreneurship as individuals become older.

However, age may also increase interest in entering self-employment for various other reasons, such as the human and financial capital requirements of entrepreneurship, which are often unavailable to younger workers, or better social and business networks, which older people typically have (Parker 2009). The age dimension is also explicitly present, for example in the social development model by Gibb and Ritchie (1982) and in Dyer's (1994) model of entrepreneurial careers. These models focus on the entrepreneurial career process and the antecedents influencing the process and on distinguishing those with entrepreneurial intentions from those with no current entrepreneurial intentions. In the social development model by Gibb and Ritchie (1982), the influences are dependent on the stage of life when one becomes an entrepreneur. Dyer's (1994) model includes the entrepreneurial career from entry to exit.

These models advocate the view of entrepreneurship as a process (see also Ronstadt 1984; Low and MacMillan 1988; Davidsson et al. 2001) and suggest that becoming an entrepreneur is a real option for older workers. A positive lifecycle effect—reflecting a general increase in the self-employment rate with age—was found, for example, by Bönte et al. (2007), Leung and Robinson (1998), and Quinn and Kozy (1996). Improved health, finances, and quality of life, as well as various innovative arrangements, enable individuals to continue working at later ages, even after having retired (Zhang 2008).

## Hypothesis Development

Senior entrepreneurs may have diverse motivations for starting a new business. One way to divide entrepreneurial motivations among senior entrepreneurs is to apply the distinction between push factors and pull factors, although the motivations do not inevitably exclude one another (Eijdenberg and Masurel 2013). Both motivations might apply for many seniors, which should be taken into account in the analysis.

Many individuals entering self-employment might have previous experience in self-employment. This is evidently true among habitual or serial entrepreneurs who continuously come up with new ideas and start new businesses. Serial entrepreneurship accounts for a significant portion of entrepreneurial activity. Earlier results have also shown that most individuals entering self-employment in later life have prior self-employment experience, suggesting that entrepreneurship at later ages is often habitual (Tervo 2014). With regard to push and pull motivations, however, the effect of prior experience is inconclusive.

### Hypothesis 1: Previous Experience in Self-Employment

> Prior self-employment experience does not differentiate between push and pull motivations of entrepreneurship at older ages.

Women represent a minority of the self-employed workforce in all developed countries (Parker 2009). Women may be somewhat more likely than men to choose bridge employment because they usually exit the workforce earlier in their careers and, accordingly, have smaller pensions. Therefore, push motivations may predominate among older women.

A long-established hypothesis is that education increases an individual's probability of entrepreneurship because it enhances her/his human capital (Rees and Shah 1986; Parker 2009). An opposite hypothesis argues that the higher earnings capacity that arises owing to a higher education level decreases the probability of entering self-employment (Le 1999; Parker 2009). Several results from Finland suggest that individuals with a lower level of education have a higher probability of entrepreneurship (Johansson 2000; Uusitalo 2001; Niittykangas and Tervo 2005; Tervo and Haapanen 2010). This evidence gives support to the latter hypothesis. However, an exception is the case of older workers, for whom higher education has been found to enhance entrepreneurship in Finland (Tervo 2014). We may assume that this finding is specifically related to opportunity-driven entrepreneurship. In addition to the level of education, the main educational orientation can be important. Pull motivations are assumed to be prevalent among seniors who have a commercial, technical, or medical education (Karoly and Zissimopoulos 2004).

**Hypothesis 2: Individual Characteristics**

1) The probability of opportunity-driven self-employment is higher among older men than older women.
2) The probability of opportunity-driven self-employment at older ages increases as the education level increases.
3) The probability of opportunity-driven self-employment at older ages increases with business, technical, and medical education.

Family relations may also differentiate senior entrepreneurs with diverse motivations. Karoly and Zissimopoulos (2004) suggest that self-employment decisions may be best viewed from the perspective of the household rather than the individual. In their study about self-employed individuals age 51 and above in the United States in 1998, Karoly and Zissimopoulos (2004) showed that 27 % self-employed workers had spouses who were also self-employed, which was a higher rate than that for the spouses of waged workers. Family support may help self-employed individuals run their business. Family characteristics may also constrain the choice between self-employment and paid employment. It can be expected that pull motivations become stronger if a senior is married, has a spouse who is working, and especially if the spouse is an entrepreneur him/herself (Blanchflower and Oswald 1990; Parker 2009).

**Hypothesis 3: Family Relations**

1) The probability of opportunity-driven self-employment increases if a senior is married.
2) The probability of opportunity-driven self-employment at older ages increases if a spouse is working and if (s)he is an entrepreneur.

Different regions provide varying opportunities for entrepreneurship (Reynolds et al. 1994; Tervo 2007; Parker 2009). Rural areas are typically characterized by weaker conditions of employment and low demand, while urban areas provide more possibilities for entrepreneurship. Less educated seniors in small, dispersed labor markets may be pushed into self-employment if they see no other realistic employment options in the region (Moore and Mueller 2002). Similarly, high unemployment in a region may push seniors into self-employment (Ritsilä and Tervo 2002).

**Hypothesis 4: Regional Environment**

1) The probability of opportunity-driven self-employment at older ages is higher in urban areas than in rural areas.
2) The probability of opportunity-driven self-employment increases if a senior lives in a low unemployment area.

## Data and Methods

The data are from Finland and are based on various registers kept by Statistics Finland, including Longitudinal Population Census File, Longitudinal Employment Statistics File, and Register of Completed Degrees. The data comprise all individuals who reside permanently in Finland. The individual-level panel data are transformed and pooled into a sample of individuals aged 55–70 years who transitioned into non-agricultural self-employment during the 2002–2006 period. This period was a time of economic growth. The data include 8703 transitions to self-employment, of which 4749 (54.6 %) were from wage work and 3954

(45.4 %) were from non-employment. Approximately 63 % entrants to self-employment were males.

The data contain individual-, family-, and regional-level information. The individual-level factors comprise variables indicating whether the individuals had previous self-employment experience since 1987, whether they were wage workers or non-employed before the transition to self-employment, their gender, their financial situation in taxable income and taxable property, and their education level and field. Family characteristics describe whether they were married or cohabiting prior to self-employment, whether their spouses were entrepreneurs and/or non-employed, and their spouse's taxable property. The environmental variables we utilize are a dummy variable indicating whether they lived in an urban or a rural municipality prior to entry to self-employment and a variable measuring the unemployment level at the local labor market area, using NUTS-4 regional classification.

In the statistical analysis, those who transitioned into self-employment ($n$ = 8703) are grouped based on their labor market activity and financial situation one year before the transition using a statistical multivariate technique, cluster analysis, and three variables available in the data: wage-worker/non-employed, taxable income, and taxable property. Thus, the clustering is grounded solely on "cold" facts; other types of push and pull motivations cannot be recorded in an analysis based on register data. There are many clustering algorithms of which the k-medians cluster analysis is used owing to the skewed distribution of the income and property variables. This partition-clustering method breaks the observations into a distinct number of overlapping groups, the number of which here is three. Each observation is assigned to the group in which the median is closest; new group medians are then determined based on that categorization. These steps continue until no observations change the groups. The similarity measure used is the Euclidean distance.

The next step in the analysis is to evaluate how various personal, family, and environmental factors vary among the entrepreneurs belonging to each one of the clusters. Can we find variables that discriminate between opportunity- and necessity-driven senior entrepreneurs? In this analysis, a one-way analysis of variance (ANOVA) is first used to test for the significant differences between means. After this preliminary overview, a multinomial logit regression is conducted to analyze further the effect of each variable on the probability that a self-employed worker belongs to one of the clusters. In the analysis, both the estimated coefficients and marginal effects are reported.

# Results

In this study, individuals who started a new business later in life are first grouped according to their recognizable push and pull motivations. Then the features of these groups are analyzed. Thus, to obtain an understanding of what motivates older individuals to switch to self-employment, profiles of necessity and opportunity entrepreneurs are developed in terms of personal and various other characteristics.

## Grouping the Self-Employed

A cluster analysis produces three groups of older self-employed workers. To label the three clusters, Table 12.1 shows the means of the clustering variables for each cluster, and a median value is reported in square brackets below the mean. In the first cluster, the "necessity" cluster ($n$ = 4764), many self-employed workers come from non-employment, and their taxable income and property remain small, while the situation in the second cluster, the "opportunity" cluster ($n$ = 859), is the reverse. For example, the median annual taxable income is only €8350 in the necessity cluster, whereas it is €100,200 in the opportunity cluster.

Following the sociological theories of entrepreneurship (Clain 2000), our interpretation is that individuals in the first (i.e. necessity) cluster were pushed into self-employment because of low income, while individuals in the second (i.e. opportunity) cluster were more likely to be pulled into it. These latter individuals had no compelling financial reason to start a business. The third cluster ($n$ = 3080) includes older self-employed workers who are in between the two other clusters with regard to the three clustering variables. Thus, the clustering produces clear-cut results, although the second cluster remains small. This result does not necessarily

**Table 12.1** The means of the variables for the three clusters

| Variable | Cluster | | | Significance of the differences (ANOVA) |
|---|---|---|---|---|
| | 1. "Necessity" (*n* = 4764) | 2. "Opportunity" (*n* = 859) | 3. "In between" (*n* = 3080) | |
| ***Clustering variables*** | | | | |
| Wage worker | 0.38 [0] | 0.80 [1] | 0.73 [1] | *** |
| Taxable income (€1000) | 8.80 [8.35] | 166.8 [100.2] | 36.7 [33.6] | *** |
| Taxable property (€100,000) | 0.26 [0.07] | 2.97 [0.89] | 0.49 [0.24] | *** |
| ***Independent variables*** | | | | |
| Previous self-employment experience | 0.70 | 0.51 | 0.53 | *** |
| Male | 0.57 | 0.83 | 0.68 | *** |
| Level of education | | | | |
| Basic (ref.) | 0.40 | 0.15 | 0.27 | *** |
| Intermediate | 0.34 | 0.13 | 0.27 | *** |
| High | 0.26 | 0.72 | 0.47 | *** |
| Field of education | | | | |
| Business and social sciences | 0.14 | 0.27 | 0.21 | *** |
| Technology | 0.22 | 0.30 | 0.28 | *** |
| Health and welfare | 0.05 | 0.15 | 0.08 | *** |
| Other (ref.) | 0.59 | 0.28 | 0.44 | *** |
| Married or co-habiting | 0.75 | 0.87 | 0.82 | *** |
| Spouse entrepreneur [a] | 0.17 | 0.15 | 0.16 | |
| Spouse non-employed [a] | 0.37 | 0.26 | 0.31 | *** |

(*continued*)

**Table 12.1** (continued)

| Variable | Cluster | | | Significance of the differences (ANOVA) |
|---|---|---|---|---|
| | 1. "Necessity" ($n$ = 4764) | 2. "Opportunity" ($n$ = 859) | 3. "In between" ($n$ = 3080) | |
| Spouse's taxable property[a] | 0.38 | 0.98 | 0.44 | *** |
| Urban municipality | 0.60 | 0.80 | 0.69 | *** |
| Unemployment rate | 0.12 | 0.10 | 0.11 | *** |

*** Significant at 1 % level. The medians of the clustering variables are given in squared brackets below the means

[a] Mean values are computed only for married or cohabiting senior entrepreneurs

mean that the number of opportunity-driven older self-employed workers is small because those in the third cluster, or at least some of them, may be classified as opportunity-driven entrepreneurs.

## Evaluating the Characteristics of Opportunity- and Necessity-Driven Self-Employed Workers

To evaluate how various personal, family, and environmental factors vary among the self-employed workers belonging to each one of the clusters, their means in each cluster are first compared with each other. Table 12.1 shows the means of the variables in each cluster and the results based on ANOVA to test for significant differences between means.

The results based on ANOVA indicate that nearly all variables have significance. For example, the proportion of individuals who are male, married, and highly educated are substantially larger among the opportunity-driven self-employed than necessity-driven self-employed workers. The only insignificant variable is, surprisingly, the variable indicating whether the spouse is an entrepreneur.

To analyze further the effect of each variable on the probability that a self-employed worker belongs to a specific cluster, a multinomial logit model is estimated. While in the previous analysis, the significance of independent variables was tested one at a time, now their mutual dependence will be taken into account in the model. In the estimation, the "necessity" cluster is designated as the reference category, which means that the probability of membership in the other two categories is compared with the probability of membership in the necessity category. Because the estimated coefficients of the model may be difficult to interpret, we also report the average marginal effects. They can be directly interpreted as average percentage changes in the probability of belonging to a particular cluster, which result from changes in the independent variables.

The estimation results from the multinomial logit model appear in Table 12.2. First, the results show that prior self-employment experience has significance. Previous self-employment experience is higher among necessity-driven self-employed workers than opportunity-driven self-employed workers. The ANOVA results above provide the same conclusion. Thus, in addition to having a large effect on the probability of entering self-employment at a later age (Tervo 2014), previous self-employment experience also differentiates between those who have push or pull motivations.

Second, gender has great significance. The probability of being classified as an opportunity-driven self-employed worker is higher for men, while the probability of being classified as a necessity-driven self-employed worker is higher for women. Education is also a strong predictor. Those who are pushed into self-employment are less educated. The probability of being classified as an opportunity-driven self-employed or "in-between self-employed" is larger for individuals who have a high level of education. The field of education also plays a role. The estimated coefficients clearly show that those with a medical education are much more likely to be pulled into self-employment than those with another educational orientation. Furthermore, if a self-employed worker has a business (technical) education, her/his probability to be classified as a necessity-driven self-employed worker is lower than (is similar to) the reference field of education.

Third, family characteristics also play a certain role. Marriage has a positive effect on the probability of being classified as an opportunity-driven self-employed worker. On the contrary, if a self-employed worker is unmarried, her/his probability of being pushed into self-employment

**Table 12.2** Multinomial logit model for the determinants of belonging to one of the clusters

| | Cluster 1. "Necessity" | Cluster 2. "Opportunity" | | Cluster 3. "In-between" | |
|---|---|---|---|---|---|
| | Marginal effect | Coefficient | Marginal effect | Coefficient | Marginal effect |
| Previous self-employment experience | 0.137*** | –0.668*** | –0.027*** | –0.628*** | –0.109*** |
| Male | –0.156*** | 1.610*** | 0.106*** | 0.532*** | 0.050*** |
| Level of education | | | | | |
| Intermediate | –0.009 | –0.143 | –0.008 | 0.070 | 0.018 |
| High | –0.189*** | 1.457*** | 0.095*** | 0.683*** | 0.094*** |
| Field of education | | | | | |
| Business and social sciences | –0.037** | 0.267* | 0.015 | 0.146* | 0.022 |
| Technology | –0.016 | 0.034 | –0.0005 | 0.081 | 0.016 |
| Health and welfare | –0.171*** | 1.511*** | 0.129*** | 0.581*** | 0.043* |
| Married or co-habiting | –0.062*** | 0.443*** | 0.025** | 0.256*** | 0.038** |
| Spouse entrepreneur | –0.011 | 0.106 | 0.007 | 0.037 | 0.004 |
| Spouse non-employed | 0.031** | –0.208** | –0.011 | –0.129** | –0.020 |
| Spouse's taxable property | –0.008* | 0.078*** | 0.005*** | 0.030 | 0.003 |
| Urban municipality | –0.047*** | 0.492*** | 0.033*** | 0.161*** | 0.015 |
| Unemployment rate | 1.050*** | –7.208*** | –0.392*** | –4.380*** | –0.658*** |
| Constant | – | –3.205*** | – | –0.486*** | – |

Number of observations = 8703; Log likelihood = –7285.1; LR chi2(26) = 1548.1***; Pseudo $R^2$ = 0.096

* Significant at 10 % level; ** significant at 5 % level; *** significant at 1 % level

increases. In addition, marriage differentiates the "in-between" category: those who were classified in this category were more likely to be married than unmarried. Having a non-employed spouse increases the probability of being pushed into self-employment, compared with the situation where a spouse is in wage employment. On the contrary, whether a spouse is an entrepreneur or in wage employment does not differentiate the motives. An interesting finding is related to the spouse's taxable property: if the value of the spouse's property is high, the probability of being classified as an opportunity-driven self-employed worker increases.

Fourth, the results imply that regional environment is important. Necessity-driven self-employed workers are more likely to be from rural areas, and opportunity-driven (and "in-between") self-employed workers are more likely to be from urban areas. Necessity-driven self-employment is also significantly more likely in areas with a high regional unemployment rate. Conversely, self-employed workers are more likely to be classified as opportunity driven in regions with a low unemployment rate than in those with a high unemployment rate.

## Summary of the Hypothesis Testing

A summary of the findings and the confirmation of the hypotheses are shown in Table 12.3. Many, but not all, of the hypotheses are verified. Contrary to expectations, prior entrepreneurship experience does differentiate between diverse motivations of entrepreneurship (H1). Most seniors switching to entrepreneurship have previous experience in entrepreneurship, and previous experience relates to push and pull motivations: individuals with prior self-employment experience are more likely to be classified into necessity- than opportunity-driven self-employment. Men who enter self-employment at older ages are more often opportunity driven than women are (H2a). Opportunity-driven self-employment at older ages increases with higher education (H2b). The field of education also has some importance; individuals with medical (and business) education are pulled into self-employment more than others (H2c). Family relations also play a role (H3a, H3b). Unmarried seniors are more likely than married seniors to have push motivations for self-employment. Contrary to expectations, having a spouse who is also an entrepreneur him/herself does not differentiate seniors with pull and push motivations. Finally, living in an urban area enhances opportunity-driven entrepreneurship (H4a), and regional unemployment enhances necessity-driven entrepreneurship (H4b) at older ages.

## Discussion and Conclusion

The results related to the question of whether older individuals who become self-employed are necessity driven or opportunity driven provide interesting insights that also carry implications for tailor-made policies. This study showed that individuals who were recognized to possess pull motives were more likely male and highly educated, often with a medical or business educational orientation, whereas those who were recognized to possess push motives were more likely female, unmarried, and less educated, and less likely to have a medical or business educational orientation.

**Table 12.3** Opportunity-driven self-employment at older ages: hypotheses and summary of findings

| Hypothesis | Explanatory variables | Expected sign | Actual sign | Probability of opportunity-driven self-employment increases |
|---|---|---|---|---|
| 1. Prior activity | Previous self-employment experience | +/– | – | No |
| 2. Individual characteristics | Male | + | + | Yes |
| | Level of education | + | + | Yes |
| | Field of education: business/technology/health | + | +/0/+ | Partially |
| 3. Family relations | Married or co-habiting | + | + | Yes |
| | Spouse entrepreneur | + | 0 | No |
| | Spouse non-employed | – | – | No |
| 4. Environmental characteristics | Urban municipality | + | + | Yes |
| | Regional unemployment | – | – | No |

"–" negative and significant coefficient; "+" positive and significant coefficient; "0" insignificant coefficient on "opportunity"

Detected gender differences add an interesting finding to the literature on female entrepreneurship. It is known that there are fewer female than male entrepreneurs in Finland and in many other countries. Earlier results have shown that differing behavior accounts for differing rates of self-employment between females and males in Finland (Tervo and Haapanen 2010). Tervo and Haapanen (2010) showed that non-monetary reasons are more important for women than men and concluded that females tend to choose self-employment if it is convenient in relation to their family and other situations. Our new result is that necessity-driven self-employment is more common among older women than among older men.

Several earlier studies for Finland have demonstrated that individuals' propensity to start their own business decreases with their level of education. Only for older workers has higher education been found to enhance entrepreneurship (Tervo 2014). In this study, we have shown that seniors with higher education are more likely to have been pulled into self-employment than seniors with less education. Furthermore, the field of education also plays a role. In particular, our results have clearly shown that those with a medical education are much more likely to be pulled into self-employment than those with another orientation in education. Our analyses are based on comprehensive register data on the entire population, containing information on the level and field of education, but the data lack information on general entrepreneurial skills. Hence, further research is needed to consider to what extent formal education affects the entrepreneurial orientation after such factors have been controlled for.

Another interesting finding of this study was related to regional environment: living in an urban area increases the probability of being pulled into entrepreneurship, while living in a rural area increases the probability of being pushed into entrepreneurship. A comparable finding is obtained when the unemployment level of regions is analyzed: regions with high unemployment push seniors into entrepreneurship, while regions with low unemployment pull them into it. Overall, these findings suggest that necessity-driven self-employment characterizes depressed regions, while opportunity-driven self-employment characterizes growth regions. Employment opportunities remain low in rural areas and in unemployment areas; for this reason, many older founders of new firms may start a business out of necessity, while in urban or low unemployment areas they may more likely take advantage of a recognized opportunity.

A fourth remarkable finding was that necessity-driven self-employed workers are more likely to have prior self-employment experience. Thus, entrepreneurship is most likely habitual, especially for necessity-driven self-employed workers. For many seniors, entering self-employment is most likely a form of bridge employment. Of course, this fact could also contribute to extending careers. Further empirical research might address the extent to which these habitual, necessity-driven entrepreneurs are successful in their ventures. Dimensions of success that could be investigated include duration of self-employment and financial success. In terms of policy, an important question concerns the types of senior entrepreneurs that succeed.

Although we have provided several valuable insights about selection into opportunity and necessity entrepreneurship, some causation must be considered when generalizing our findings to other contexts. The results may depend on the institutional country context and business cycle within a country. For example, our results are from a period of steady economic growth, between 2002 and 2006. However, during a recession, when the demand for labor is low, the push and pull motives for entering self-employment may be different. A novel feature of the current study was that the grouping of individuals into opportunity- and necessity-driven self-employed workers was based on a cluster analysis and financial register data. This approach has clear advantages, since the population registers are reliable and complete with no response or sample bias. Earlier research has been based on survey (GEM) data to investigate the motives of becoming self-employed. Further research is needed to investigate to what extent this difference in the measurement of motives can affect the findings.

Policymakers are keen to promote self-employment among older age groups as one way of offsetting higher unemployment and early retirement among these groups, thereby reducing demands on welfare that result from having an increased number of older people in the population (Curran and Blackburn 2001; Kyrö et al. 2012). Nonetheless, the opportunities of older people entrepreneurship are not fully understood, especially since the current policies seldom distinguish between unalike types of motives behind entrepreneurship. This study hopefully gives useful information about various motivations behind senior entrepreneurship.

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## Notes

1. As the result of many studies based on the Global Entrepreneurship Monitor (GEM) database, the push–pull terminology has partly given way to necessity- and opportunity-driven entrepreneurship (cf. Giacomin et al. 2011).

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# 13

# The Older as Entrepreneurs: A Diversified Group—Illustrated Through Entrepreneurship in Technical Consultancy and Artistic and Literary Work

Martin Klinthäll and Elisabeth Sundin

## Introduction

Age and entrepreneurship is an expanding field both in research and politics. In politics, all over the world, it is the very young in particular that receive explicit attention in relation to unemployment. Unemployment is, however, also a fact for older people in the labor market but is considered a problem more for the individual than for society (Eurofond 2012). This is a shortsighted and superficial way of handling old age, both on the labor market and in society. All societies need competence and experience, and a labor shortage is expected in the not too distant future in

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many sectors—not least in health care, care and environmental issues (Ds 2013: 8) at the same time as many societies face population ageing.

Entrepreneurship can be seen as something that is out of the ordinary, but also as an obvious means for an individual to go on working for as long and as much as she/he wants. From a more negative perspective, entrepreneurship, or rather self-employment, can be seen as a way to avoid age discrimination in organizations or as the last resort for older individuals in the market. Whether it is the positive or the negative alternative that best describes this varies for many different reasons and on different levels. The different perspectives indicate that older entrepreneurs constitute a very heterogeneous group. Sundin and Holmquist (1989) wrote in the 1980s that self-employed women had just two characteristics in common—they were women and they were self-employed—and the same statement can be applied to older people as entrepreneurs. The old category is highly diverse, both from an identity and image perspective, and encompasses many social categories. In this chapter, the variety of entrepreneurship is illustrated through entrepreneurs in two different sectors: technical consultants and those involved in artistic and literary work.

We will first discuss the key concepts of old age and entrepreneurship separately before combining them in a section on age and entrepreneurship. As both age and entrepreneurship are context-bound, we will relate the discussion to the context from which the empirical part of the article is derived—Sweden in the first years of the twenty-first century. We then present some facts and figures on older entrepreneurs in the sectors for technical consultants and artistic and literary work, in order to illustrate different aspects of age and entrepreneurship. The empirical overview of older entrepreneurs is based on register data, presented below, for the whole population of Sweden. A number of interviews were also conducted with entrepreneurs as well as with experts on entrepreneurship and on age and the labor market.

## Age and Ageism

Age as a social construction can be discussed both from a critical ageism perspective (e.g. Bytheway 2005; Riach 2009) and from a more "positive thinking" approach—the latter mainly in official documents emphasizing the need for manpower in a long-term perspective (e.g. Cedersund et al. 2017, presenting some documents). From both perspectives there is agreement that age is an important part of identity and something that is both ascribed by others and created by the individual or the group itself. The designation "older" is not something objective or universal, not even for one individual at a particular time (Krekula 2009). Although the common understanding of age is as an ambiguous concept, it is used both in the statistics, politics and even research to mean the number of years lived. "Older" workers are sometimes defined as those aged 55 years or older (e.g. Kautonen et al. 2014) and sometimes the limit is set at 60. Retirement pension is a common threshold for being considered elderly, which is complicated by the fact that many pensioners also have income from work.

The Swedish researcher and debater Bodil Jönsson (2011) states that age and ageing have many negative connotations in Sweden, which motivates *älderism*, a Swedish version of the international concept of ageism. Ageism makes age a power system just like gender and ethnicity. These associations and also their expression are both verbal and practical (Nelson 2002; Anderson 2008). Ageism is a problem not just for individuals but also for society, from different perspectives. One is that it will be necessary in the future to retain healthy and vital individuals in working life after the official age for retirement. The Swedish system for retirement is, from some perspectives, rather complicated (Sundin 2014). The state pays a pension to every citizen. The complications arise because the starting date of the payments can be changed by the individual. The same kind of negotiation of age concerns a public pension connected to working on the market as well as pensions from the private sector, emanating from collective agreements or individual contracts. Briefly, no Swede is obliged go on working in old age in order to survive, although there may be a feeling that it is necessary. But there are great differences between individuals and groups. The class dimensions seem to continue and even be sharper at older ages. In the political debate, the "elderly poor"—mainly women who have been working part time in low-wage occupations dominated by women, or not been working on the market at all—are used to illustrate the shortcomings of the welfare state. For a long time, the official retirement age was set at 65, which is still the default retirement age in a formal sense. Hence, there is a strong general notion of 65 as a threshold age, when you are expected to retire, in spite of today's flexible retirement system.

## Age and Work

The importance of work done for, but also by, the elderly is often expressed by politicians. According to investigations of individuals close to retirement, a majority support the idea of increasing the labor force participation rates among elderly. Still, older individuals are found on the labor market to a lower extent than younger. The why-is-that-so questions have two lines of answers and explanations – the older do not want to work, or the older are not welcome on the labor market; that is, in the organizations. It is a common understanding that age is a negative characteristic for individuals in the labor market, that is, in the organizations where age is constructed and negotiated. Older individuals meet a lot of assumptions: they might, for example, be seen as less flexible, less productive and unwilling to learn to upgrade their obsolete knowledge. These assumptions are used as an excuse for stereotyping and discrimination (Bytheway 2005; Brough et al. 2011).

Negative attitudes to older people in working life, and how they should be countered, is a common theme. The need for so-called age management in organizations has been addressed (Kadefors and Hanse 2012). A comprehensive meta-analysis of ageism using 232 studies on attitudes towards old as well as young people (Kite et al. 2005) shows that attitudes towards the old are more negative than those towards the young, and also that older individuals are more ageist than younger. In particular, the authors found ageism against older adults when assessing stereotypic beliefs. Regarding employers' attitudes, surveys show that although many employers consider the work performance to be as good among older people as among younger, and their loyalty and reliability even better, they are still not particularly interested in older workers as employees (Barnes et al. 2009).

Age discrimination is a fact on the Swedish labor market, although often in disguise. When older individuals are interviewed about their decisions to continue working they emphasize the importance of the attitudes and actions taken by their workmates and managers, according to Nilsson (2013) in her study from the Swedish labor market. The individual's own health, as well as that of their family members, was also of great importance. Another factor was what their partners were doing.

## Entrepreneurship and Self-Employment

Entrepreneurship has developed as a field of knowledge during the last decades partly because there is a great demand for entrepreneurship and the good things following from it. However, knowledge production is fragmented and the close connection between entrepreneurship and the labor market both at organizational and individual level is often neglected, although it is there. This connection is illustrated in this chapter as well as in our other studies on older individuals as self-employed and entrepreneurs. In this section we first present some contemporary research and standpoints concerning entrepreneurship, as a background to the following discussion on research into entrepreneurship and age. We concentrate on old age and seniors, although in practice young entrepreneurs receive more attention.

In public debate, and indeed in the research, the term entrepreneur is often used as a synonym for a self-employed business owner. However, the word entrepreneur has long been used with varying meanings (e.g. Landström et al. 2012). Researchers often take, as the point of departure, Schumpeter's (1934, 1949) thoughts and writings on the issue. He argued that entrepreneurship and entrepreneurs can be found in all contexts and organizations. This view of entrepreneurship, which emphasizes both creativity and action, is shared by many (e.g. Johannisson 2010) and we find concepts such as "intrapreneurship" (e.g. 23.1 Entrepreneur 2012), "public entrepreneurship" (e.g. Bjerke et al. 2007; Bjerke and Karlsson 2011), "social entrepreneurship" (e.g. Fayolle and Marlay 2010), "cultural entrepreneurship" (e.g. Mangset and Röysen 2009) and "public sector entrepreneurship" (e.g. Klein et al. 2010; Kovalainen and Sundin 2012). The concept of entrepreneurship has often come to be equated with the creation of a new organization, particularly a private business. Nowadays, however, a distinction is frequently made between two main types of new entrepreneurs: those starting because they have to, so-called necessity entrepreneurs, and those who start because they discover or create business opportunities, so-called opportunity entrepreneurs (cf. Global Entrepreneurship Monitor, GEM).

The question concerning staying or leaving the market is also relevant for entrepreneurs, which is a main theme for the following empirical parts. The situation is often different for the self-employed than for employees. The decision is up to them, although it is neither easy nor without restrictions. Studies by Kautonen et al. (2014) found that entrepreneurs often wanted to leave if they could find someone to take over the enterprise. They felt deeply about the enterprise and sometimes also for their employees, the customers, or the location. Most of these reasons are social rather than economic Kautonen et al. (2014).

The reason why individuals choose entrepreneurship is a major issue in both politics and research. Entrepreneurship is highly valued, with arguments both from individual and societal perspectives. In international comparisons Sweden has often been classified as low when it comes to the proportion of entrepreneurs, but according to the Entrepreneurship Survey of the EU25 this has changed; Sweden's score is the highest. The high proportion is totally constructed by a high share of opportunity entrepreneurs (and very low on necessity entrepreneurs). Qualified information on incentives for choosing entrepreneurship is (or rather was) found in the publications from the Swedish Agency for Economic and Regional Growth.

Reasons given by new starters in Sweden (New Entrepreneurship in 2011. Table 10, page 7) are:

| | |
|---|---|
| To work independently | 32.1% |
| To realize my ideas | 31.8% |
| My product is needed | 13.3% |
| Unemployment or anticipated unemployment | 8.3% |
| Opportunities for good earnings | 4.7% |

The most frequent alternatives, to work independently and to realize ideas, are considered to be "opportunity entrepreneurship" and the unemployment alternative to be "necessity entrepreneurship." These concepts are international, as an example used in the GEM studies (Global Entrepreneurship

Monitor, 2016), but in a Scandinavian welfare regime the concepts "push" and "pull" might be more appropriate (cf. Holmquist & Sundin).

## Age, Entrepreneurship and Self-Employment

One of the main questions concerning older entrepreneurs is whether and how they differ from entrepreneurs in other age groups; whether they have something special to offer to the market or display certain disadvantages. Do the findings from the entrepreneurship literature apply to all age groups and does age discrimination on the labor market influence entrepreneurship among seniors? Some indications can be found in the international literature which we present below.

The researchers dedicated to older entrepreneurs have, unlike other entrepreneurship researchers, related entrepreneurship to the labor market in some way. This may be, as in the case of the Older Women Learning project (OWLE) (Annichiarico and Grasso 2011) about discrimination against older people in the labor market and difficulties in getting a job when you are considered elderly (cf. Kibler and Wainwright 2011). Negative attitudes towards older people in the labor market also affect those still working, for example quit rates among older people who experience negative attitudes in their workplace (e.g. Nilsson 2013). While ageist attitudes may weaken the position of older adults in the labor market, Róin (2015) maintains that "successful aging" has become a dominant concept in science and the discourse on ageing, and that staying active in old age tends to become a moral obligation. Hence, self-employment may be a solution in the presence of ageism at the workplace, in the absence of employment alternatives and when retirement is not desirable.

Singh and DeNoble (2003) use the term "bridge employment" for people who have had a long working life, retired and then decided to return to work before they finally retire completely. Singh and DeNoble categorize older entrepreneurs according to the way that the business relates to their work in the past and to the incentive to start. There are businesses that have a direct connection with previous activities (incremental) or are completely separate from them (punctuated equilibrium). The latter may imply a person who realizes an old dream and makes a new phase in the lifecycle possible. This group is "constrained", in other words they have been prevented. They have explicit entrepreneurial attitudes and can often be innovative. The first group is termed "rational," in the sense of economically rational, because they simply continue to work in order to improve their financial situation. The easiest way is to continue within the same profession. The third and final group are the "reluctant"; those who have to become self-employed for economic reasons. The nature of the business is guided by what is possible rather than by strong desires. Singh and DeNoble (2003) also touch on the question of the scope, not just its direction, and argue that many older entrepreneurs are part-timers.

Weber and Schaper (2004) refer, as do many others, to Singh and DeNoble's categorization and link explicitly to the terminology of push and pull. Older people who experience negative attitudes and even discrimination in the labor market can be "pushed" into self-employment because no other options are available to them, especially if they have a pension that they perceive to be too small. Older entrepreneurs may also hold comparative advantages, according to Weber and Schaper, such as experience, established networks and a good financial situation.

The classification of entrepreneurs suggested by Singh and DeNoble (2003) is also useful in a Swedish context, when analyzing the relationship between age, working life and self-employment. The reluctant entrepreneur, pushed into self-employment, is a relevant description for older persons in a number of situations. As discussed above, older workers may face age discrimination in the workplace. Although employment would be preferable, an unsatisfactory or even marginalized situation at work may push older workers into self-employment. Their economic situation may also push older workers into self-employment. Research shows that older people who become unemployed have more difficulty in finding new employment, and for some people self-employment may be the only way to return to work. A third situation is when self-employment becomes a way of managing on a low pension. Although an incremental strategy may be the easiest way for the "reluctant" entrepreneur, the incremental entrepreneur would typically be a "rational"; a person who wants to prolong working life within his or her own profession. Continuing work as self-employed may be economically rational, and there is a high demand for certain professional services, but work also provides other values, such as meaning and pleasure. Swedish data shows that qualified professional services in the fields of technology, law, accounting and auditing, health services, and so on belong to the most common activities among older entrepreneurs.[1] The third category, the "constrained," is a relevant description for older entrepreneurs who start their business in a new field in order to make a living out of a personal interest or a hobby, bring about a change in society, or realize a dream in some other way.

Age and gender are of importance for labor market actions and reactions including entrepreneurship. In an international perspective, the elderly in Sweden are in the labor market to a high degree, although less so than the middle aged. This is true of both men and women. The Swedish labor market is gender segregated both in horizontal and vertical dimensions. Women, and occupations dominated by women, have lower incomes, which also has consequences in later life as it influences pensions (Statistics Sweden 2016). The gender segregation of the labor market includes self-employment and owner management (Holmquist and Sundin 2015). Five years after the official retirement age, self-employment is the dominant market relation. The Swedish entrepreneurs are also mature in an international perspective, with around 25 % of them older than 55 years of age. The choice of sector and occupation differs between age groups, in particular for men. The biggest group among middle-aged men (35–54) is housing construction while those over retirement age are engaged in farming and forestry and business-to-business (B2B) services. Women are in services, both B2B and personal services, in all age groups, although farming and forestry are also expanding noticeably for them.

## Diversity and Similarities Empirically Illustrated Through Two Sectors

### Methods

Below, we illustrate the diversity of old age entrepreneurship in Sweden by means of an empirical analysis of two different industries: technical consultancy and artistic and literary work. The quantitative section comes from a large database (LISA) with information compiled from Swedish administrative registers, such as population registers, tax registers, labor market and educational registers. Hence, the database contains rich socio-economic and demographic information on the total population of Sweden aged 16 and above for the period 1990–2012. Owing to reclassifications of self-employment, the study analyzes patterns of self-employment from 2004 to 2010, a period when the definition of self-employment, as defined by Statistics Sweden, is consistent from year to year. Some previous analysis results based on this information have been presented in papers, and a range of "facts and figures" is available in a commented report in Swedish (Sundin 2015).

A number of entrepreneurs and self-employed have been interviewed to give their opinions on age, work and entrepreneurship, from their personal, individual perspective, in organizations and in contemporary Sweden. The individuals have been chosen for a variety of sectors and occupations. Note that all contacted persons were very willing to share their reflections and experiences.

## Technical Consultancy and Artistic and Literary Work

Technical consultancy is the industry in Sweden displaying the largest number of self-employed individuals over 50 years of age. Artistic and literary work ranks number 15 on the list of the most common industries among old-age entrepreneurs. Figure 13.1 shows the total number of self-employed in technical consultancy and in artistic and literary work in the age groups between 55 and 75 years of age. Although the number of self-employed is smaller in artistic and literary work, this industry is different from many other industries, since self-employment is higher than regular employment in all age groups. Finding regular employment in this industry is difficult, for instance because many producers rely on freelancers. This is often discussed as a problem, as many people with educations for these sectors end up finding themselves in a constantly precarious situation, trying to make a living from short-term contracts. Despite this, new entrepreneurs enter the industry from other occupations or industries.

As technical consultancy is a larger sector than artistic and literary work, the number of self-employed individuals in technical consultancy


**Fig. 13.1** Number of self-employed persons in technical consultancy and in artistic and literary work, by age in Sweden 2010; ages 55–75

is higher for all ages, and peaks at age 66. There is a steep increase in the frequency of self-employed technical consultants from age 59 and a steep downturn after age 66. The age profile is more level in artistic and literary work. There is an increase from age 58 peaking at age 66, then a decrease until age 70, where the number of self-employed in the industry stabilizes at about the same level as before the increase started. Hence, in both industries there is a peak in the number of self-employed between ages 60 and 70. The increase before the peak is more than 100 % in technical consultancy and 70 % in artistic and literary work. Hence, in both industries there is a peak in the number of self-employed between ages 60 and 70. The increase before the peak is more than 100 % in technical consultancy and 70 % in artistic and literary work.

The two sectors have been chosen as at first glance they display very different important dimensions for entrepreneurship. For example, the demand for technical consultants is said to be high, and an education and competence in technology is a safe part of the market, while artistic and literary education have uncertain prospects and supply is much higher than demand. Consequently, entrepreneurs within the former industry, where there is a high demand for professional services, would typically belong to the "rational" category: professionals using an incremental strategy. The latter industry contains a wide range of creative arts and other cultural activities, which is why many new entrepreneurs in the industry may be expected to belong to the "constrained" group: people who change their career in order to work with something they really enjoy and have always wanted to do.

Perhaps more interesting than the total number of self-employed of different ages is a closer look at the age differences regarding new entrepreneurs, in other words at what ages we find those who become self-employed in these two industries. Technical consultancy is a male-dominated industry. Figure 13.2 shows that there is a large difference in the number of men and women who start their own business in technical consultancy between age 55 and 75. However, there is an increase for both sexes from the late 50s to age 65 (women) and age 66 (men). The increase before the peak is as steep (more than one and a half times in eight years) for men as for women, and the decrease after age 66 (about two thirds) is also as steep for men as for women.

Figure 13.3 shows the difference in the number of men and women who start their own business in artistic and literary work between ages 55 and 75. Although the incidence of start-ups is higher among men than among women in this industry, the difference is much smaller than in technical consultancy. The general tendency of an increase with age until the institutionalized retirement age, where there is a peak and then a decrease, is similar in both industries.

## Where Do They Come From?

So who are these old-age entrepreneurs? Both industries seem to attract new entrepreneurs, who are approaching the age when the environment expects retirement, and people keep starting new businesses in these industries way beyond the age of 70, but at a decreasing rate. Are they "incremental" entrepreneurs who start their own business within their profession in order to prolong their working life and make some more money ("rational"), or because they have to ("reluctant"), for example because of unemployment? Or is it rather a question of "punctuated equi-

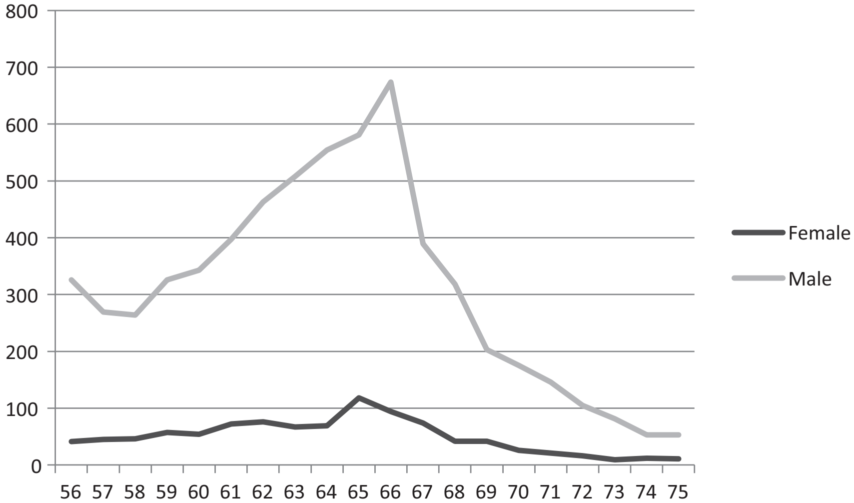


**Fig. 13.2** Number new entrepreneurs in technical consultancy by age and sex, ages 55–75, Sweden 2004–2010

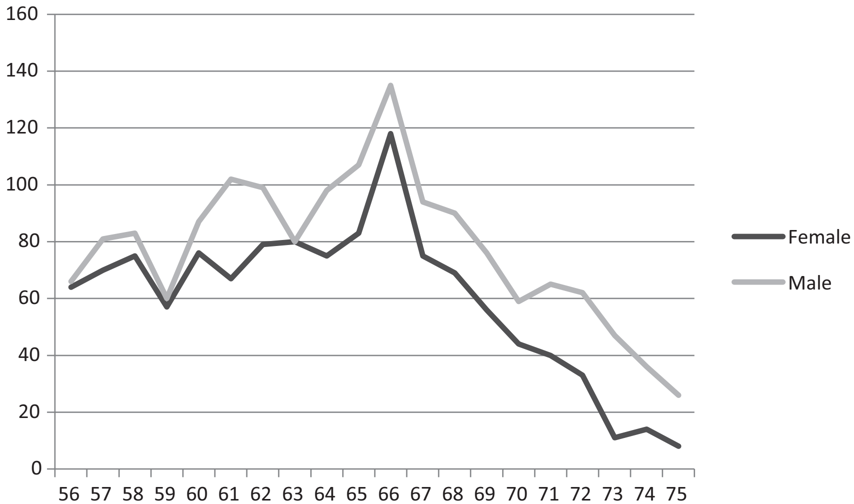


**Fig. 13.3** Number new entrepreneurs in artistic and literary work, by age and sex, ages 55–75, Sweden 2004–2010

librium": people who start a new career, perhaps in order to fulfill the dream of making money out of something they love to do ("constrained")? A look at the former activities of the new entrepreneurs may give us a hint.

Table 13.1 indicates that, according to expectations, most new entrepreneurs in technical consultancy are "incremental," since their activities in the previous year are in the same or similar fields of work. A quarter of those who became self-employed in technical consultancy between 2004 and 2010 came straight from employment in the same industry, while 16 % display SNI = 0, which means that they were either unemployed or retired the year before becoming self-employed (it could be that they were technical consultants—or something else—the year before that). Here we may find the "reluctant" as well as "bridge employment." Other industries of origin supplied relatively few new entrepreneurs, since there are over 400 industries of origin in total. House construction supplied almost 3 % of the new entrepreneurs in the industry, while all other industries supplied less than 2 %. Most industries on the top ten list include work that could well be represented within technical consultancy: construction, infrastructure and planning, highly qualified university instructors, machinery specialists. From the individual's perspective they could also be incremental. It is not unusual that the former employer is

**Table 13.1** Former industry of employment or self-employment among new entrepreneurs in technical consultancy (year before start-up). Top ten industries by number of persons becoming self-employed in technical consultancy in Sweden 2004–2010, ages 55–75

| Industry by SNI code | SNI code | Frequency | Percent |
|---|---|---|---|
| 1. Technical consultancy | 74,202 | 1347 | 24.74 |
| 2. SNI code missing | 0 | 875 | 16.07 |
| 3. Housing construction | 45,211 | 155 | 2.85 |
| 4. Administration of infrastructure programs | 75,131 | 83 | 1.52 |
| 5. University education | 80,301 | 70 | 1.29 |
| 6. Elementary education | 80,102 | 68 | 1.25 |
| 7. Condominium management | 70,204 | 62 | 1.14 |
| 8. Road construction | 45,230 | 57 | 1.05 |
| 9. Machinery wholesale | 51,879 | 56 | 1.03 |
| 10. Overall planning at state or municipality level | 75,111 | 55 | 1.01 |

(In total 416 industries of origin. SNI Swedish index of industries; the official industry classification system in Sweden) the biggest customer, as illustrated by Ivan, who is interviewed below. Elementary education and condominium management seem to be a little more distant from technical consultancy, although there are specialist technical teachers in elementary education, and housing management involves technical maintenance. The top ten list is dominated by industries which are clearly male labeled.

Artistic and literary work is an industry where you would expect to find the typical "constrained" entrepreneur. A look at Table 13.2 reveals that one fifth of the new entrepreneurs came from unemployment or retirement, which however could have been temporary: it is unclear. The rest of the industries represented in the top ten list came from industries related to artistic and literary work, such as education, journalism, or work in non-profit organizations. Hence, the industries represented in the list indicate that "incremental" entrepreneurship is quite common among those self-employed in artistic and literary work, more common than we expected. Also in the artistic and literary work industry, new entrepreneurs seem for the most part to be people who stay in their occupations, but continue as self-employed after having worked for public or third-sector employers. Artistic and literary work seems to constitute a field of competence and relations, the same as technical consultancy.

**Table 13.2** Former industry of employment or self-employment among new entrepreneurs in artistic and literary work (year before start-up). Top ten industries by number of persons becoming self-employed in artistic and literary work in Sweden 2004–2010, ages 55–75

| Industry by SNI code | SNI | Frequency | Percent |
|---|---|---|---|
| 1. SNI code missing | 0 | 364 | 19.76 |
| 2. University education | 80,301 | 100 | 5.43 |
| 3. Artistic and literary work | 92,310 | 98 | 5.32 |
| 4. Education in study associations and NGOs | 80,424 | 84 | 4.56 |
| 5. Elementary education | 80,102 | 80 | 4.34 |
| 6. Newspaper publishing | 22,121 | 73 | 3.96 |
| 7. Radio and TV media production | 92,200 | 62 | 3.37 |
| 8. Other NGO activities | 91,330 | 61 | 3.31 |
| 9. Work in religious organizations | 91,310 | 51 | 2.77 |
| 10. Secondary education, non-vocational | 80,210 | 50 | 2.71 |

(In total 201 industries of origin. SNI Swedish index of industries; the official industry classification system in Sweden). NGO = non-governmental organization.

Most employers within media and journalism are private, but the sector has gone through significant rationalizations which may have pushed many journalists and media workers into self-employment (Banks and Hesmondhalgh 2009).

## Financial Situation and Outcome

Next, we will take a look at income patterns in the two industries. Looking at disposable income, that is, all sources of income net of taxes, Fig. 13.4 shows that men in technical consultancy stand out as the group with the highest incomes. Mean disposable income is over SEK 350,000 for both the 55–65 age group and the 66–75 age group. This is a high number, considering that mean disposable income for all Swedish residents aged 55–75 was SEK 209,000 in 2010 (black line in Fig. 13.4), but also when compared with all self-employed in the same ages (SEK 266,000, grey line in Fig. 13.4). Mean disposable income for women in the same age groups is only SEK 246,000 and SEK 218,000 respectively.

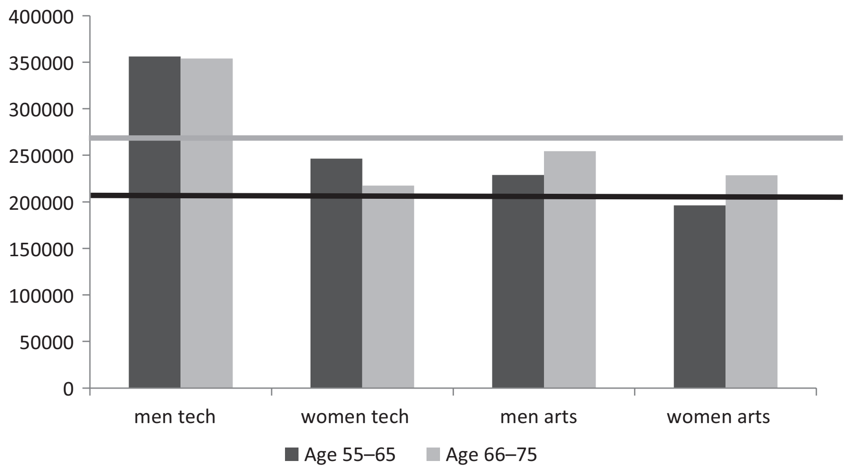


**Fig. 13.4** Mean disposable income, ages 55–65 and 66–75, men and women in technical consultancy and in artistic and literary work. Sweden 2004–2010 (Note: The bold black line indicates mean disposable income for all Swedish residents aged 55–75. The bold grey line indicates mean disposable income for all self-employed Swedish residents aged 55–75)

In artistic and literary work, there are also gender differences, although smaller; men in the 55–65 age group display a mean income of SEK 229,000 compared with SEK 196,000 for women in the same age group. The difference in the older age group is SEK 254,000 for men, compared with SEK 229,000 for women. The differences are in line with the gender differences in the Swedish labor market. Hence, the differences shown in Figure 13.3 are more importantly between men in technical consultancy and the other categories, between which the income differences are smaller. In artistic and literary work, mean disposable income is higher among those above retirement age, whereas the opposite is true for the self-employed in technical consultancy. However, in all groups, total disposable incomes are relatively stable before and after age 65. This indicates that continuing a professional career as a self-employed person is an important means to maintain income level after retirement—more so for men than for women. As can be seen, men in artistic and literary work have higher incomes than women in technology. We believe that this is remarkable and calls for more investigation.

Regression analyses (not presented here) show that for those moving from unemployment to self-employment, income increases are insignificant in both industries. The only category which experienced a significant income change after moving into self-employment was those who moved into self-employment in technical consultancy from employment in a different industry, and that was a negative change. Our regression analyses also show considerable income differences according to the status of the firm running a limited company is associated with significantly higher incomes compared with sole proprietorship.

## Two Cases: IT Ivan and Art Artur

As seen from the figures and tables, entrepreneurship and self-employment seem to be a continuation of working life activities. This is supported by the older entrepreneurs we interviewed. To illustrate this, we will present one man from the IT sector and another from the artistic and literary work sector.

Ivan has been in the IT sector since he graduated with a degree in technology. For many years, he was employed in various large organizations and subsequently as a consultant for large consulting firms. He gained many valuable experiences through his work tasks and assignments. For some years, in his mid-30s, he worked on his own. Soon he found both social and professional disadvantages. The big employers offered regular further education. On his own he had to finance that himself. After some time, he therefore went back to employment with a larger company.

Some years ago, he started on his own again. “It was a feeling—I wanted to be free. I have been a manager for so many years—but in the last few years I was a project leader with a manager over me. I did not like that.” The demand for freedom also included which tasks to work with: “I knew I could get orders.” That conclusion comes from the fact that his former employer is his biggest customer. Marketing is therefore not necessary. The need for constant relearning he felt in his 30s is no longer there. After many years in work his knowledge base is solid. He can keep up easily with what is new. The financial situation was not an issue when he started this time. He activated his public pension and took out a private pension. Another contributing factor was that his wife was still working.

Ivan still works hard but he also plays golf with other early retirees. He has no intention of retiring fully: “It does not feel right. As long as it is fun and I get new assignments I will continue.”

Artur is self-employed in arts and culture. He has been working with culture in various ways all his life. When he started work after his degree newspapers, journals, cultural institutions and so on employed individuals to work for them regularly. Through work he got to “know everyone.”

He often thought of establishing himself on the market but did not let it happen until some years later, close to the official retirement age. His grown-up daughters reserved a stand for him at the Gothenburg Book Fair. Their intention was to force him to realize some of his ideas and turn them into written material. Like Ivan, he does not have to earn his living from his enterprise. He has his pension and his wife is still working. He relishes his experience and his independence, which he can use for the benefit of authors and other artists. He can create products never seen before. His customers are both individuals interested in culture and businesses in the field. The first category is something new for him; he used to be a link between the market and the producers: now he has to handle the market himself. Being in business gives him a sense of still being part of an active life. That is important for his young wife: "It is not much fun for her to say that she is married to a retired man—but saying that she is married to an entrepreneur or a culture creator, that is different."

## Concluding Discussion

Entrepreneurship in old age is an important phenomenon. In this chapter, we discuss entrepreneurship for those aged 55–75 and find that self-employment peaks at the age when society expects you to retire. The number of self-employed starts to increase before 60 and peaks at the institutionalized retirement age of around 65, before the number in self-employment decreases again. Around age 70, self-employment is back at about the same level as before age 60. Old age entrepreneurs are a heterogeneous group with regards to their backgrounds, identities and motivations for work. Our analysis of Sweden from 2004 to 2010 shows that people aged 55–75 who started a new business in technical consultancy or artistic and literary work used to work in a total of more than 600 different industries. In both industries studied, self-employment allows incomes to stay stable beyond age 65, and in artistic and literary work, mean incomes actually increase after age 65. However, if we look more closely at the industries of origin, many people seem to continue with work that is similar to what they did in their last job. In that sense, most of the old-age entrepreneurs seem to be "incremental," in the sense that the business start-up does not break with their professional past. Although there are those who move into self-employment from unemployment, perhaps reluctantly out of economic necessity, for most old-age entrepreneurs in these two industries self-employment is a way to prolong working life and keep incomes from falling at retirement.

Unexpectedly, self-employment in artistic and literary work seems to be almost as incremental as in technical consultancy, an industry where professional skills and work experience is in high demand. We do not find as much "punctuated equilibrium"—breaks with the professional past—in the artistic and literary work industry as expected. This is supported by our interviews with entrepreneurs in the two fields of business. Although the two industries are very different regarding work content and formal skills requirements, the patterns of entrepreneurship towards the end of working life are similar. To understand this pattern we have to include the individual's life outside the market. There are two starting points for this inclusion, both emanating from the Swedish welfare system and traditions. As emphasized above, all citizens receive a pension that gives at least a basic economic level. Self-employment is therefore not necessary for strictly economic reasons. The other starting point is the distribution and tradition of adult education organized by a number of organizations connected to political parties, religious associations, social movements such as "veterans in this town," and so on. Most of these organize courses in artistic and literature—both to learn about these topics or to produce something themselves. We know from studies and statistics (Kulturanalys 2016) that many seniors participate in these activities. Our point here is that they break with their professional past and both fulfill dreams and find new social arenas. From the perspective of the individual, this could be genuinely positive and good; from the perspective of the economy and society it is less so, as the experience and knowledge is taken from the market. The theoretical conclusions are that self-employment and entrepreneurship are closely connected both to other parts of the market and non-market institutions and embedded in the welfare regime.

The register data used for this study show clear differences between women and men. The differences are in line with the situation in other age groups, as we discussed with reference to our own previous findings as well as to other research. We also presented two of our interviewed persons and their considerations on their former working life and present situation as owner managers. Both of them are men. Interviewed women give, in some respects, other perspectives on age and entrepreneurship and self-employment. This is an interesting focus for coming publications.

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## Notes

1. This and other information on the Swedish situation comes from the studies made in our research program, see also under "Methods."

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# Section 6

## Age in Transition

# 14

# Intergenerational Interaction and the Benefits of Ageing Employees in a Nursing Home

Kristiina Niemi-Kaija

## Introduction

Considering various discourses on ageing, more mature employees are often treated as a homogeneous group with limited performance (Halme and Aaltio 2011). An example of this kind of categorization is the concern about the ability of ageing employees to cope at work until retirement age or the inability of ageing employees to meet the latest employment requirements (Ruoholinna 2009; 13). These can be seen as examples of economic stories, where different facts are presented without paying further attention to the significance this presentation has. This approach to promoting the work ability of ageing people (e.g. Ilmarinen 2009) is not without meaning, but there is also a danger of creating general stereotypical assumptions and a negative image of ageing employees, which may in turn cause hidden and indirect age discrimination in human resource (HR) practices and policies in organizations (Aaltio et al.

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2014). Taking into account the limitations of conventional discourses, positive openings are required.

In this chapter, I reflect on a qualitative case study conducted in a municipal nursing home. In particular, I take an aesthetic approach to illustrate how ageing employees contribute to intergenerational interaction in the organization. In recent years, a growing amount of research has called attention to intergenerational challenges in work life. For example, there has been interest in discursively constructed generational categories (Pritchard and Whiting 2014), differences between generations in their attitudes to work (Benson and Brown 2011), and age sensitivity in organizational analysis (Robyn et al. 2014). All of this research suggest that there is still much more to learn about the interaction between the young and elderly people. Generationally sensitive management and understanding organizational generations can together improve the organizing and dealing with working life (Niemistö et al. 2016). As Fineman (2014) notes, we need to know more about how age impacts on workplace experiences and relationships.

I suggest that the aesthetic approach raises important issues of intergenerational knowledge as a wealth of skills and experiences based on sensations. In its philosophical meaning, experience is to be understood as knowledge gained through the senses, the intellect, or both (Määttä 2015: 12). According to this view, making sense of experiences can be rationally motivated, but it can equally be based on non-rational consideration such as on aesthetic experiences gained through the senses (Carr and Hancock 2003; Rooney and McKenna 2008; Sauer 2005; Strati 1999). Several researchers (e.g. Courtney 1995: 13–21; Gagliardi 1996: 566; Strati 1999: 107) note that the aesthetic approach addresses people and their judgment based foremost on subjective feelings and other things, which intellectual judgment is not able to understand. Seeing, hearing, touching, tasting, and smelling create feelings and human information in the members of an organization, not in the form of cognitive thinking and rational contemplation, but as sensory understanding. Sensitive information includes not only sensory knowledge, but also perceptions, impressions, and illusions (Vuorinen 1990: 20).

Even though organizational aesthetics assumes that people draw on their subjective experiences in making judgments, it also pays attention to the shared knowledge or interpersonal knowledge (Strati 2003: 53) that belongs to the group. By conceptualizing knowledge as a process rather than an object (Nicolini et al. 2003: 6), it emphasizes the bodily knowledge acquired through experience and social interaction (Ropo and Parviainen 2001), the kind of knowledge that can be gained simply by being present and picking up signals and reactions (Ladkin 2013: 330). Therefore, in order to understand the experiences of individuals, we must understand the various interpretations based on the subjective awareness of the members of organizations, and the collective transformations thereof (Strati 2000: 13; Hansen et al. 2007: 552; Küpers et al. 2013: 84). In other words, meanings are formed through observations, emotional experiences, perceptions, impressions, illusions, beliefs and estimates in a constantly transforming environment (Laine 2001: 26–27; Virtanen 2006: 154–157). As developers of social constructivism, Berger and Luckmann (1994: 11–37) state it is interesting how the subjective judgments are expressed through everyday experiences, and how the ideas and assumptions move on to new generations or other employees, who enrich the meanings given to experiences with their own meanings and interpretations. At the core of this is language, with which we can organize our experience. This viewpoint of language is presented more precisely in the next section.

This chapter begins by presenting the previous studies of aesthetics and story-making in organizations. It is suggested that even though the aesthetic dimensions of work life are often difficult to observe, they are still meaningful in the effort to create a more humane work life. The following section will be a description of the data, as well as qualitative analysis methods based on aesthetic categories. The results produced by the data are analyzed through three different topics, each of which shed light on the matter from a slightly different perspective. At the end, the results will be summarized and the main conclusions will be highlighted.

## Aesthetics and Storytelling

Over the past few decades, a growing number of scholars have recognized the importance of stories in organization studies (Rhodes et al. 2010). Research has dealt with a wide range of topics such as academic discourse on symbols (Kociatkiewicz and Kostera 2015), storytelling as a managerial tool (Gabriel 1995), and narrative and ethics (Rhodes et al. 2010). As Gabriel notes (2015: 211), theorists such as those noted above have not accepted stories as merely happening in organizations but as contributing to constructing the organization itself. Stories are a source of information about the organization but are also a central part of the action in the organization (Taylor et al. 2002: 318) because the majority of "doing" in work life is verbal (Boje 1991). Here, stories are seen as an important source of empirical evidence, especially because they are related to personal experiences and, as Gabriel (2015, p. 213) notes, they are "motivated acts through which people seek to express their feelings and attain their objectives."

Analyzing intergenerational knowledge through the lens of stories using an aesthetic perspective poses unique challenges. As several researchers of organizational aesthetics (e.g. Hatch 1999; Guillet de Monthoux and Sjöstrand 2003; Koivunen 2007) have emphasized, it is difficult to describe an aesthetic understanding with language. A similar idea is related to Taylor's (2002: 827–836) concept of aesthetic muteness. According to him, it is difficult to talk about aesthetic experiences in work life and to transform the experienced feeling into something verbal. Partly, this is a matter of unfamiliarity because we express "thinking" more often than "feeling." On the other hand, it is not acceptable to talk about the aesthetics of organizational experiences in work life. The prevalent fear is that such talk would threaten harmony and efficiency, and create unpleasant and challenging conflicts. If no one talks about aesthetic experiences, people will not get used to them either.

Despite the aforesaid challenges, the utility of aesthetics to the stories containing intergenerational knowledge is not without meaning. Taylor et al. (2002) note that the strength of aesthetic experience is based on a felt meaning without conscious logical process, connectedness to our lived experience, and enjoyment for its own sake being independent of instrumental concerns. In weak stories, employees are inspired by numbers based on regularities and measurable rational evaluations. In these stories, the experiencer analyzes the moment intellectually, without a comprehensive experienced significance and a sense of personal connection. This is not a story that creates a negative sensitive experience, but a story that does not create it at all. Strong stories are based on feelings, create a strong aesthetic experience, and are remembered by the listener. Although others may question what has been experienced, the individual nevertheless has a tendency to trust intuitively any meaning that has emerged, as it feels right.

In the next section, I will explain how in this study aesthetic categories work as clues in the strong stories and the feelings related to the intergenerational interaction. According to Strati (1999: 184, 2000: 18–22), aesthetic categories can be used to analyze the ties that connect the employees to the environment they are working in, as well as to the materials they use. Expressions based on aesthetic categories do not impart what an organization is like in reality; instead, this is an employee's own subjective reaction and a feeling associated with the moment. In justifying the use of a term, a person reveals their own judgments in everyday language. Interjections such as "that sounded nice" or "that felt nice" function as clues here. This evaluation is a matter of a dynamic and direct feeling of whether we like something or not based on sensory experiences (Courtney 1995: 13–21; Strati 1999: 2; Taylor and Hansen 2005: 1212).

## Stories as Research Data, and the Method for Analysis

The data are obtained using interviews with 17 professionals (nurses, enrolled nurses, homemakers), who work in municipal home care services and sheltered accommodation designed for older people. Apart from one, all of the employees were women; 63 % of the interviewees were over 45 and 33 % of them were over 55 years of age; 37 % of the interviewees were younger than 45 and 47 % of those were under the age of 30. Reliability was forced by the participation of all the employees of the work unit in question.

Constructions of work from the organizational members were elicited through stories of experiences on the edge of uncertainty, which is a common element of everyday experiences at work. The purpose was not to consider the uncertainty as such, but to reveal moments that evoke feelings in a transforming environment. They were asked how they acted in a situation, and how they observed others to act. They were also asked to describe feelings related to the situations, and the style and tone of their own actions and those of others. All questions aimed at highlighting the underlying intergenerational knowledge, which was not based solely on rational descriptions of what was done. The age perspective was not separately highlighted, unless the interviewees did not emphasize it themselves. The researchers only looked for clues of ageing in the analysis stage. The aim of this practice was to only influence such aspects to come to light that the employees themselves considered important.

As the interviews progressed, it was astonishing to see how similar the stories of the employees were. All interviewees described their enjoyment at being at work, and they all experienced the work community as functioning ideally. In the study, it is also important to observe the negativity related to aesthetic categories, and to avoid addressing aesthetics only through romanticizing concepts such as harmony and pleasure, as stated by Hancock (2005). For example, an employee's tendency to calculate could produce important information about what the employee considers to be significant for them. Conflicts could also be used as information about what really affects employees. As the interviews proceeded, the questions became more specific, asking directly if any conflict situations occur in the work community. This was intended to ensure that not only positive stories were shared owing to a reluctance to highlight negative aspects about an employees' work community.

Discovering the experiences in the stories of the nursing staff, I chose two aesthetic categories, ugliness and grace. According to Strati (2000: 21), for example, asymmetry and disproportion are related to ugliness, as well as pretentiousness, which emphasizes a calculating attitude, unnaturalness, and artificiality. In organizational studies, ugliness highlights those forms of manifestation that define organization as something secular and false. Ugliness can also be related to unpleasant work environments and unpleasant experiences in work life.

Strati (2000: 23) notes that grace is also an important category in organization-related research, as the attractiveness and pleasantness related to it are themes that can highlight judgments of taste based on feelings better than other categories. It highlights mercifulness and conveys feelings that are surprising and charming. An employee is constantly looking for new forms that can be repeated in front of others, and to find endless variations for their actions and interpretations. Actions are not guided by external expectations and acknowledged instrumental goals, but sensations and perceptions related to the moment. This relates to the pleasure derived from seeing and hearing the people and objects around us. Grace can also be defined as a beauty giving pleasure whereas ugliness has the reverse effect (Tatarkiewicz 1974: 453).

In the analysis, I first selected all interview extracts that included stories of intergenerational knowledge related to the experience of work. After reading the data over and over again, I classified it using the aesthetic categories, ugliness and grace. These categories are not contrary to each other, but it is assumed here that together they can reveal both challenges and opportunities in an everyday interaction. The task was to find complicated similarities and phenomena, which became increasingly more precise as the study proceeded. Finally, I ended up with three themes describing the style of action where ageing employees seemed to contribute to intergenerational interaction. I have named these themes "transformation of lived experience," "public threshing," and "making space for others." These themes appeared to be recurrent in all of the interviewee stories.

## Employee Constructions of Work in Terms of Aesthetics

### Transformation of Lived Experience

As suggested earlier, aesthetic experience is based on felt meaning and it is connected to our lived experience. One of the repeating themes in the stories of the ageing people was feelings related to experiences that occurred in the early stage of their career and how their judgments of these experiences had been shaped over time. The experiences were based on a subjective sensitive understanding of what feels unpleasant, what kinds of operation styles and methods create calculating attitudes, and on the other hand, what is good to avoid. For instance, the ageing employees described how they felt unwanted, inferior, or—as stated in the following quote—worthless and outsiders: "So, what does it feel like when you're nothing and you're left alone." However, they did not feel trapped in the past. As in the following story, an ageing employee wanted to break a kind of vicious and ugly cycle, and follow the idea of all new employees being appreciated and received with joy and grace:

> "And I've experienced elsewhere how students can be treated horribly. And then I decided that I'll never treat students as badly as I was treated. We always welcome them, and guide them as well as possible."

In the stories of the young and new organizational members, they approved of the style of performance adopted by the ageing employees and respected their efforts to create a gracious atmosphere: "When I came here, I got such a great reception, warm and nice. I've been really grateful for that." The experience was transferred to newer and younger employees so that they could internalize it in turn, as their own subjective experience (Berger and Luckmann 1994: 80). As one of the younger employees described: "All of these teachings I'm getting from these old people, I'm definitely going to keep using them." Ageing employees noted that it was not only a one-sided transformation of ideas because they had also learned a lot from the new and young employees and valued their insights.

Through the eyes of historical sensitivity (Saito 2007: 157), the ability to consider how the past informs the present (Bathurst et al. 2010: 318; Barrett 2012: 51), it is not possible to look only forward because our judgments must also be based on what has happened before. It is a matter of training the memory of an individual or group, and learning based on examples, experience, and repetition (Weick 1995: 549). As Woodward and Funk (2010: 296–302) state about meaning-making emerging from our sensual knowledge, "alternative fictions can be generated, explored, discussed, shared and tested with respect to an historical context. These alternative fictions then constitute the basis for self-reflection and learning for the meaning-maker." It is not just a matter of how it is possible to understand reality better, but how work communities could achieve the reimagining, renarrating and reenvisioning of complicated problems and approaches.

The transformation of past experiences to new practices in the stories of the interviewees can also be traced to the argument by Taylor et al. (2002) presented earlier about the power of stories. The consensus was enabled when everyone felt connected to the story and to each other. The stories created by the ageing employees "felt right." They used stories effectively to stimulate commitment, inspire, and motivate others (Gabriel 2015: 217).

## Making Space for Others

Although the stories showed that everybody's view of their present work was almost exclusively positive, it was not quite the idyll described by Barthes (2012: 88) in the sense that there were no disputes. There were also ugly situations in the daily routine. The employees said that occasionally work "lags behind" and gets "congested," with everyone "stuck in a tar pit" unable to move forward. Everyone was busy, and days went "galloping past." Often, the only plan missing in organizations is the plan for how things have happened in reality (Barrett 2012: 1).

The interaction between the young and the elderly people helped everyone cope with the confusion. In all the stories, the work community was described as a "lifeline" that ensures that "the trump cards have been dealt to the employees":

> "At least for us, throughout the time I've been here, we're like a really tight bunch. Our work atmosphere here is amazing. A good team spirit. That's a real sense of community."

Instead of being involved only with the instrumental completion of one's own work, everyone preferred an encouraging team spirit and helping others. Employees who had worked for a shorter period of time in the organization described that the older employees especially showed how to help others by example, and invited everyone to act positively for the benefit of the whole community. Individualistic performance was described as actions that only take place "in a limited personal bubble" or "while navel-gazing." Therefore, valuation was focused on ways of acting that gave others the space to shine:

> I felt this great energy. With others, I noticed that I want to encourage them, and if I'm feeling upset or anxious, they will help me get rid of that feeling. It immediately became a good experience. And sort of feeling confident, when you see that others support you.
>
> We won't be pointing fingers at anyone, and we're always sympathetic. We understand our co-workers.

As mentioned in the first phrase above, the responses created the conclusion that the gracious feeling is amplified when people are not afraid of their own perfection crumbling, and losing face in front of others. In the stories from the ageing employees, they realized the benefits of different personalities and performance styles. It was not important who is best at their work, or who is right; rather, being able to be open to inspire others and to be inspired by others was important. If you fell, the others supported you. It can be described as a gracious feeling, a sensation of spontaneity instead of internal discipline and enjoyment that comes from seeing and hearing the people around us (Strati 2000: 23). Building on the ideas of Barrett (1998: 617), an individual was able to set aside their virtuosity and create opportunities for others. Therefore, the solutions were in the hands of the community, and attention focused on the entire work community's know-how. As one of the oldest employees notes, shared normative assumptions about these criteria of gracious work and actions were expressed in practice:

> Everyone here has good sides and bad sides for that to be accepted. To be appreciated, to look for the good sides more than the bad sides. That would already go a long way. And because life can become quite tangled up sometimes, and you can't help it, you'd be encouraged, so that you could keep on going. That's important too.

At the same time, the actors were active in creating coalitions with everyone:

> "And no one keeps track of who they're working with. It doesn't matter who you're working with. You'll do fine with everybody."

The organizational members also realized that gracious performance is a necessary guideline for those who work in their organization, but it is not an absolute truth for everyone. Following Harding's (2002: 66) ideas, power relations should also be explored in a way that clarifies who defines what is ugly or gracious, who is allowed to be gracious and who is condemned to unnatural positions. Those few newcomers who didn't internalize the idea of making space for others didn't want to stay working in the organization for a long time. In that way, the aesthetic category also worked as an excluding criterion for those who did not share the same ideas about work.

## Public "Threshing"

Even though the sense of community was put forward in the stories of the organizational members, it was not a matter of denying subjective feelings related to daily experiences at work. Following the ideas of organizational aesthetics, sensations and perceptions are at the centre, as is subjectivity in the sense that people can have different aesthetic experiences of the same situation (Bowie 1990: 11). In the stories of the nursing staff, sharing experiences and aspiration to understand others was described time and again by using the Finnish word *puida*, which means "to thresh" and "to discuss." Symbolically, the wheat is separated from the chaff, and together they will find the gist of what is important in a situation. As one of the employees explained, "Things are usually discussed, and we always come to some sort of an agreement." All of the employees stated that the strength of "threshing things together" lies in not "stewing over" problems, but aiming to solve them constructively together:

> Of course, in care work there are some things that are set in stone, and they have to be done in a certain way. Not in any other way. But wherever possible, we always talk a lot about what would be the most sensible course of action for us.

The role of the ageing employees seemed to be to arouse a charming feeling and by that to encourage others to share things. The ageing employees aimed to make all new recruits become used to openness from the very beginning, as the following stories from older employees highlight: "Feeling confident that things will be discussed, everyone is honest. I make sure all newcomers here know that." As the quote shows, openness was valued and it was associated with honesty and reliability. As one of the ageing employees said, "The more you talk, the more pure you are." For their part, younger employees and newcomers explained that they had learned to talk about ugly feelings and situations and it was possible, as one of the younger organizational members noted, to "let the cat out of the bag." Or as another newcomer said: "As soon as I started training here, everyone was like, 'Remember you can talk about absolutely anything.'"

The connotation regarding threshing grain created a notion of something more than just presenting facts. Understanding, based on experiences, feelings, and intuition, as well as other alternative operational logics, were preferred instead of analytical and logical knowledge. The work community was open to what was going on, and situations were addressed immediately, so that past experiences did not become a burden and conflicts did not pile up. This was enabled by having weekly informal "threshing" sessions, which were considered to be important for coping with the feelings. The intergenerational relationships were created during the peaceful moments, which helped people listen and to see themselves and others. It was not only a matter of seeing or hearing but also a desire to arrange conditions in such a way that people dared to work for longer with the feelings achieved through their senses.

Because the organizational members had a platform for sharing experiences, they were able to avoid dangers. A rational focus on facts alone can limit people's actions unilaterally, overlooking the alternative logic in action. Actions seem to be only somewhat related to each other, and solutions have little to do with the real thing (March 1991). Instead of avoiding feelings, the work community was open to what was going on, and situations were addressed immediately, so that past experiences did not become a burden:

> "I've learned to trust that even if the cat's let out of the bag, they're just things here at the work place. And it's not going to turn everything upside down, even if we discuss difficult topics."

As noted before, the consistency of language and practice was based on the fact that the language produced, especially by ageing employees during the past decades, touched everyone also on an emotional level. Therefore, the style and method for handling problems was the decisive factor. Action required all parties to have the desire to aim to understand the other person, even risking having one's own views and value settings questioned. It was not a matter of "either/or" attributes, but rather of empowering interaction between various perspectives, different personalities, and different age groups.

## Discussion

As noted in the introduction, the problem-oriented standpoint of ageing has partially become an institutionalized fact, presenting ageing employees as a homogeneous group, and mainly in a negative light. In this chapter, I have attempted to challenge this negatively characterized speech about ageing in working life. The significance of age cannot be dispelled, because as Andrews (1999) has stated, a positively tinted discussion about agelessness can turn against itself, overlooking the good things related to ageing. In particular, the interest in this chapter was to illustrate how ageing employees contribute to intergenerational interaction in the organization of one particular municipal nursing home. At the methodological stage, I analyzed the stories of the nursing staff using the aesthetic categories ugliness and grace.

This chapter presented a positive example of how ageing employees' sensitivity and ability to create powerful stories and practices supported the whole work community's courage to act. The results are in line with Berleant's (1973: 341) idea that words are not only what they mean, but also what they do. In summary, this study showed how ageing employees used their authority based on lived experience as an enabling power that disclosed alternative gracious perspectives on work life. During their decades-long careers, the ageing employees had strengthened their sensitive understanding of what feels good, what kind of operation style and method creates well-being for everyone, and on the other hand, what it is good to avoid. Leading by example, ageing employees shared this pool of knowledge with new and younger employees who, in turn, internalized it in their own world of experience. In this way, a method and style of operation, which everyone recognized as the good atmosphere of the work community, had formed during the last decades. I identified three themes to describe this dynamic: transformation of lived experiences, making space for others and public "threshing."

This research is situated in a research field that comes out from time to time underscoring the sense of community (Sandelands and Boudens 2000; Marotto et al. 2007; Koivunen 2009). The attention paid to the sensitive experiences in the community raises the feeling of what it is like to be more than ourselves in relation to others; the focus is more on the work community's virtuosity and less on the subject's perfection (Niemi-Kaija 2014: 109). A self-centered view may create weaker social and moral results than an extrovert action that is based on good will and friendliness towards others (Tatarkiewicz 1980: 124). In their article analyzing the performance of an orchestra, Marotto et al. (2007: 389–390) note that the moments of collective virtuosity are often short lived, but they have significant and permanent effects that can contain a deeper understanding of the self, as well as of the relationship with others. In a functioning work community, efficiency requirements are perceived as shared.

The results of this study contribute to creating a wider conception of the sense of community by extending the discussion to intergenerational interaction and especially to the role of ageing people as activators in creating a tolerant and responsible work environment. However, the role of ageing employees that makes it possible to create a gracious environment does not exclusively rely on their ability to avoid ugliness. If ugly forms of daily experiences and practices are silenced, there might be a risk of creating expectations of perfect performance without dispute. As Taylor (2002: 835) argues, emotions may become channeled into a general sense of dissatisfaction. Furthermore, if contradictory values, ideals, and reactions within the network of intergenerational relationships are eliminated, the idea of performance is narrowed to the concept of predictability and stability and to the rational practices of organizations. From the perspective of aesthetics, the functioning community needs to have the sensitivity to cross borders and change direction when necessary, even with the risk of failure. The range of possibilities related to activities is not pinpointed to pre-determined cognitive concepts, but to various methods for solving problems through interaction between the elderly and young people in an organization.

A similar argument becomes apparent in the discourses of organizational complexity. For example, Kociatkiewicz and Kostera (2015) present in their study labyrinths as an indelible part of human experience, a sense making tool for understanding organizational complexity and the impossibility of linearity. Meanwhile, they challenge the rational management practices based on linear thinking, and see leaders as mythical heroes who control and make sense of the complex reality. There needs "to be a voice to talk about experience in terms that open minds and do not limit them to thinking in straight lines of profit and loss … unnecessary complexity may save our minds from dullness and our organizations from a profitable path to death." As Kuepers (2011: 22) notes, societal and environmental contexts urge organizational members to more profound transformations. In organization studies this calls for new methodologies and approaches (e.g. Taylor and Hansen 2005; Springborg 2010; Vince and Warren 2012) that challenge instrumental and cognitive processes in working life.

Through an aesthetic approach, used as a method in this chapter, it is possible to gain knowledge of subjective experiences that construct and shape reality and shift the objective and mechanical understanding of processes to practice-based ideas (Niemi-Kaija and Aaltio 2016), also in the case of transforming intergenerational knowledge. It also enables us to reveal the qualities of the story and how these stories work in daily experiences. The results are presented in a particular context that uses the specific categories ugliness and grace as a guiding light. This can be seen as a limited perspective, but I argue that the use of ugliness and grace paid attention to the problematics of experiences, and led to a better understanding of everyday experiences than rational models would have done. While instrumental questions pay attention to efficiency and performance, aesthetics questions lead to analyses of aesthetic categories. These questions are not led by instrumental goals, but instead by how we want to make the surrounding reality more aesthetic. (Strati 1999: 184; Taylor and Hansen 2005: 1216.) According to Gagliardi (1999: 143–146), organizational aesthetics is an empowering method that feeds the imagination of the members of an organization as well as the researcher. Its primary attempt is not to create coherent explanations about organizational phenomena based on facts, logic, and verification, but rather, perspectives of how things could be.

At the same time, it is noticed that the emerging themes do not represent an absolute description of ageing in the light of intergenerational interaction, but rather, one possible way of analyzing in this field of study. Through case comparison the analysis might be enriched by alternative practices such as the "dark side" (Linstead et al. 2014) of organizational dynamics: What if ageing people were not able to break a kind of vicious cycle based on past experiences? What if younger employees did not respect the knowledge created by ageing employees? What if there were no space for sharing feelings related to daily experiences? For further research, this study might also be extended to show the link between aesthetics and ethics as a method to analyze intergenerational knowledge.

In this chapter, I have brought forward the kinds of dynamics intergenerational knowledge may generate and the possible role ageing employees might perform as "activators" in this. It has been interesting to see how younger people accept older actors' versions of the past, how this version has transformed via interaction with others, and what kinds of relationships have then been formed (Aaltio 2009: 16; Durepos et al. 2012: 269). To conclude, intergenerational communication and interaction should be taken account of more carefully in organizational practices and research. Only by giving both sides, younger and older employees, an opportunity to shine, can we make working life more human and more gracious.

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# 15

# Reconceptualising Work-Retirement Transitions: Critiques of the New Retirement and Bridge Employment

Catherine Earl and Philip Taylor

## Introduction

There is an extensive and growing research literature, particularly in the psychology and management disciplines, concerning 'bridge employment' which, it is argued, is increasingly occurring between the end of a career job and full retirement. However, this area is undertheorised and lacking a long view in terms of an appreciation of the wider literature concerned with work and retirement, in particular being informed by the political economy and lifecourse perspectives. Bridging the gap between work and retirement is of current concern as governments push out the ages at which people work and retire, with retirement, once considered the moral foundation of social welfare systems, being refashioned as a kind of unemployment. This chapter takes a critical stance on what we describe as the new retirement and the concept of bridge employment, questioning the motives for the emergence of the former and the latter's

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utility for researchers and policymakers as a lens through which to view the evolution of work–retirement transitions.

This focus on employment opportunities for older workers is motivated by a public policy push to extend working lives in response to ageing populations and the future sustainability of social welfare systems. Concerns about changing age demographics and the sustainability of social welfare systems, Flynn et al. (2013: 46) argue, mean measures taken to create early exit schemes are no longer tenable and must be reoriented towards the employability of older workers. This focus is not new and has been increasingly promoted since the 1990s, with nations facing population ageing having implemented policy measures, such as the closing off of early retirement pathways, the removal of mandatory retirement ages, increasing the age at which an individual can claim a pension, pension arrangements to enable working part-time while receiving a pension, active labour market programmes, and legislation proscribing age discrimination in the labour market (Taylor 2013). Employers have also responded to workforce ageing with policy initiatives (see, for instance, Taylor et al. 2013), although as Vickerstaff et al. (2003) argue, 'management is [maybe] unwilling to give up entirely the flexibility offered by the option of early retirement on redundancy or efficiency grounds' (p. 283). Bridge employment, understood as a human resource management practice, is believed to enable organisations to retain valuable skills and experience at reduced costs. It is argued that this approach presumes the knowledge and skills of older workers are valued by employers (Zhan and Wang 2015: 208).

In considering the evolution of the concept of retirement we argue that cultural barriers to older workers' employment are deeply rooted in ageist assumptions about their relationship with the labour market. Here we revisit Walker's (1981) description of the political economy of old age. In this context we provide a specific critique of bridge employment, arguing that the concept is not particularly helpful in describing the productivity or activity of older people as it does not apply to a significant proportion of them, including many with low skills, those with disabilities, the unemployed, and women. Thus, we are left with the problem of late- and post-career working at a time when governments are promoting longer working lives, but there is no road map for how many will be able to achieve this. The literature on bridge employment suggests that this is only available to some workers. The rest face later life 'inactivity' (as retirement has been reconceptualised as productive activity). This is argued to be a new form of 'bridge unemployment' or 'bridge underemployment'.

## Critiquing the New Retirement

Recent conceptualisations of retirement have considered it to have been transformed or reinvented, to have become more blurred and more flexible, and thus its probability and timing have become less certain. However, closer analysis reveals the ambiguities about definitions of late- and post-career working and related forms of retirement—such as phased retirement relating to work hours, partial retirement relating to job task, or gradual retirement relating to either or both hours and task—do not necessarily make conceptualisations of retirement more blurred. Retirement pathways are highly individualised at the same time as being shaped by health status, financial security, and family responsibilities, among other factors. This individualisation of retirement is not necessarily blurry. A traditional notion of retirement was somewhat idealised as, firstly, an abrupt transition from work to non-work at a planned age and, secondly, a clear demarcation between work and non-work.

Who experienced this? While it is assumed to have been normative, its narrowness overlooks many other widely documented pathways into and through retirement, including early retirement stemming from disability or chronic illness, the emergence of new family responsibilities, desiring to continue working to avoid boredom, or being compelled to continue working owing to financial hardship. For example, based on interviews with couples in the UK aged in their 50s and 60s, Loretto and Vickerstaff (2013) found that focusing on the gendered division of labour reveals that the traditional distinction between retired and non-retired has become fuzzy. They report that older couples identified as retired but were doing some paid work (p. 71), women's retirement trajectories were based on their partners' circumstances especially regarding finances and health (p. 72), joint retirement (within 18 months of each other) was less common than research suggests (p. 73), and retirement decisions play out household divisions of market and gender work and shock, for example, of sudden illness (p. 79).

Taking the example of older women who undertake a combination of paid work, unpaid work, volunteering, caring, leisure, and other activities in their lives before and after retirement, what is clear is that the combination of activities may vary so that the proportion of paid work may be higher or lower (or indeed absent). Such recent conceptualisations of retirement focus on individual trajectories and take into account the transitions of older workers, including women, who may not have followed the traditional clearly demarcated paths of career work and abrupt retirement. While their retirements may involve various transitions, making them relatively fuzzy in contrast, it is also probable these have long been so but were relatively invisible until recently.

Studies have attempted to remodel the traditional androcentric concept of retirement oriented on a (male) breadwinner career model by attempting to include the experiences of women, for example by considering career breaks as normative and decision-making within a family rather than an individual context. Everingham et al. (2007) have constructed three models of women's retirement. The first 'gateway' model is built on a dichotomy between work and non-work where a working life ends abruptly and is replaced by a period of non-working even though such patterns of work are seemingly less common to women. Women may experience a sense of continuity with life outside paid work, with a new life phase of retirement generated by their husband's cessation of work (cf. Loretto and Vickerstaff 2013).

The second 'transitional' model involves slowing down, testing retirement (e.g. via long service leave) and easing out of work. Arguably, it is shorthand for explaining that many older women engage in part-time work. Part-time work may be attractive to older women in order to maintain performance standards in physically demanding roles, to manage a chronic health condition, to achieve work–life balance, or to meet caring responsibilities. It is encouraged by societal responses to the ageing population in which older workers are accommodated through more flexible work practices and attention to reducing workplace discrimination. However, for women who experience more fragmented work trajectories, a reduction in working hours may exacerbate economic disadvantage.

Moreover, older women may be seeking to build their careers at later ages, particularly if they have returned to the labour force after a career interruption owing to family caring responsibilities.

The third 'transformative' model involving working into retirement is the one Everingham et al. (2007: 518) argue better suits women by allowing them to have 'autonomy and control' over their time. Such a model allows women to seek multiple objectives to meet family and income obligations while continuing to work in paid roles over which they have more control of time and task. Rather than easing themselves into a life of non-work, they found different forms of appropriate or suitable working. This may involve casual working (such as relief nursing), self-employment (such as running bed and breakfast accommodation), or a different occupation (such as writing).

What is common to each of the three models observed by Everingham et al. (2007) is that women's retirement transitions are qualitatively different to men's, firstly, as they are more varied and individually shaped and, secondly, as they are embedded in family responsibilities so that a dichotomy between paid and unpaid work becomes less meaningful.

Sargent et al. (2013) propose there are two forms of the reinvention of retirement. The first is a continuation of a distinct and well-defined period of life that occurs at the end of a career trajectory with changes in the timing, the kinds of activities pursued, and the meanings associated with them. This may include bridge employment, caring for grandchildren or elderly parents, or committing to long-term volunteering using career skills. Each of these examples is grounded in traditional notions of career work and a dichotomy between paid and unpaid work. In contrast, the second form challenges or rejects retirement as a distinct period because it is no longer appealing or realistic. This may then involve working longer, where there are opportunities for customising work to suit individual goals. The dominance of discourses of productive or active ageing are so narrow as to limit potential alternatives, such as different notions of Moulaert and Biggs's (2013) concept of '*desired* aging' (in Sargent et al. 2013: 16, original emphasis). Again a contrast is drawn between traditional notions of retirement centred on fixed ages and defined stages that are imposed upon an individual and recent notions that are more individualised and centred on choice and desire. Arguably, this contrast is with the academic conceptualisation of retirement, not with retirement per se. Conceptualising retirement in terms of an end of active life may simply reflect an assumption of work-oriented identity.

Byles et al. (2013) contrast two forms of women's retirement centred on new-found freedoms, opportunities, and change versus retirement as a continuation of work and family responsibilities. Retirement is not bounded by chronological age and does not necessarily involve a demarcation between work and non-work. For women, abrupt retirement is less relevant as they have interrupted careers and they may be increasing the amount of work they do at later ages.

Retirement for women may not involve an ending but a continuation of household and family roles and activities. It may be a transient and evolving process, not a pre-determined and clear pathway. Retirement for these women did not mean retiring from active life—almost all were involved in a range of social and community, religious, leisure, and caring activities—and this is common in studies of women's retirement. Contrary to previous studies, access to a pension was not a factor in women's retirement decisions, nor was their husband's decision to retire, but family responsibilities and caring was an influence on decisions for women to retire. In these cases, there was a lack of planning which has implications for financial security. It should be noted that this study was based on a relatively healthy and wealthy sample with only 10 % considering their retirement to have been forced.

Different women have different choices and constraints regarding their late- and post-career activities, but underpinning many models of reinvented or transformed retirement are assumptions that paid work is an individual good and women want to continue working, even when they use retirement as a time for career transformation and taking on new roles and challenges. Women continue to routinely juggle many different paid work and socially normed unpaid work roles, such as elder care, grandchild care, and domestic duties, during their working and post-work lives. Illustrating a 'process of the folding of the economy into society' proposed by Adkins (2012: 621–2), this moves beyond historical divisions that locate women either in the family or the workplace to recognise their productive and 'value-creating activities' beyond the workplace that, like unemployment, generate 'productive moments' that are dispersed across society. It is within this context that individuals are making decisions and shaping pathways to retirement.

Also neglected by these models are those who do not want to continue in paid work, who cannot find work, or cannot find suitable work. At a time when public policymakers are encouraging people to work longer, retirement is being portrayed as another form of unemployment. The assumption that the one model of retirement involving working longer is good and therefore desired is problematic. People do not necessarily want to work longer and those who are privileged are able to choose to, but they have always been socially empowered with choices, even when early retirement was being encouraged. Assumptions of choice inherent in these models are blunt and do not take into account that such choices may be constrained by a range of factors including but not limited to health and wealth, also skills, family pressure, normative social roles, and individual expectations. For those who have never had unlimited or expansive choices, why (or how) would the possibility of choices suddenly emerge in later life?

In the next section of this chapter we describe the characteristics of bridge employment. Developing the above discussion, this is followed by a critique of the concept.

## What Is Bridge Employment and Who Does It?

It is widely accepted that retirement has become a process and is no longer accurately described by a single abrupt event. The majority of older workers, it has been argued, transition out of the workforce gradually, with up to two thirds doing so in the USA via forms of bridge employment (Cahill et al. 2006; Zhan and Wang 2015). The concept of bridge employment is being promoted in the context of changing transitions between work and retirement. The term describes a broad range of late- and post-career jobs including part-time work with the same employer that involves a reduction of working hours (also called phased retirement); a new or modified role with the same employer that involves a reduction of job complexity or physical demand (also called partial retirement); a job with a new employer in the same career field; a job with a new employer in a new career field; and self-employment. Bridge jobs share an ambiguity of being located beyond career but proceeding retirement. They may involve a defined time period before full retirement, typically two or three years, but may also be a new extended career stage stretching over a considerably longer time period. This variety of experiences of retirement has implications for health, quality of life, income, and leisure activities. Those participating in bridge jobs tend to be relatively well educated, financially secure, and healthy people who enjoy working (Alcover et al. 2014). Nevertheless, it has been acknowledged that older people with different needs may have access to different bridges to retirement and that lower job satisfaction is associated with being pushed (not pulled) into a bridge job (Zhan and Wang 2015).

It may be assumed that financial insecurity or inadequate retirement incomes might push older workers into bridge jobs. However, it is clear that bridge employment is not motivated by financial necessity. Alcover et al. (2014: 270) report that cross-country analysis in Europe demonstrates that people who continue working beyond traditional retirement age share characteristics of high levels of education, above-average salaries, generous pensions, and high socio-economic status. They are not motivated to work on by financial necessity. Rather, they continue working because they find it interesting and motivating. In the USA also, a study of bridge job prevalence found that financial insecurity does not appear to be a main driver of gradual retirement transitions among career workers. However, bridge employment among those with little or no financial assets is more likely to involve a full-time work pattern in wage and salary work (Cahill et al. 2016). In Australia, a study of construction workers found that pre-retirees will opt to enter bridge jobs if they perceive they are not adequately financially prepared for retirement (Mariappanadar 2013), which implies that they would not otherwise consider working on and retiring gradually. Indeed, panel survey data suggests Australian baby boomers rarely enter bridge employment and, as in Europe and the USA, older workers in Australia are motivated to make a gradual transition to retirement when they have higher levels of household wealth, long histories of working, and a partner who works (Warren 2015a).

Those who are able to secure bridge jobs in order to continue working often do so via ad hoc or informal arrangements with their current employer (Tishman et al. 2012). Phased retirement in the same job and with the same employer is the most popular form of bridge employment in the USA (AARP 2006) and in Australia (Humpel et al. 2009). While phased retirement has no specific definition, it refers to a range of flexible practices in informal and formal policy aiming to reduce hours or work of employees approaching retirement (AARP 2006: 3). Such informal arrangements are distinguished from a formal programme that has a management structure for formal approval, eligibility criteria, written materials at orientation, and continued access to employer-sponsored benefits. Informal arrangements are made by employers seeking to retain an older worker, often one who has specialised skills. However, as it involves an ad hoc process, it does not address labour or skills shortages (AARP 2006: 6). Examples of typical flexible work arrangements used in phased retirement include: job sharing; telecommuting; consulting/contracting; casual employment (i.e. working or filling in on an 'as needed' basis); sabbaticals; flex-time, part-time, or seasonal work; and reduced work days and work week (AARP 2006: 8).

Blended work is a special form of bridge employment available to knowledge workers that involves working remotely, so the home becomes a site for production. Blended work illustrates how bridge jobs can benefit older workers, although their availability is limited to knowledge workers and other teleworkers. According to Van Yperen et al. (2014) blended work refers to time-independent and location-independent working and may be particularly beneficial for those workers that have a high need for autonomy at work, and for those who have a weak need for structure and for relatedness at work. Similarly, Dropkin et al. (2016) state that blended work extends the working lives of knowledge workers, building on flexible working arrangements. Damman (2016) describes it as being the result of an individualised agreement between employee and employer. Workers may blend work regularly, or only in case this is needed owing to specific circumstances. Notably Zhan (2016) states that blended employment can work well, but it should not be regarded as an ideal case as it is not available to most older workers.

Continuity is as an important factor in transitioning from work to retirement and an important factor in attractive bridge jobs. It has been clearly established that gradual retirement involving continuity with an employer and career are the most popular form of bridge employment (Alcover et al. 2014). This is most successful and most welcome when it involves gradually reducing work hours in a staged process that is voluntary. Employment policies and practices that promote an employee's control of their retirement decisions have been found to enhance well-being in later life and facilitate longer workforce participation (de Vaus et al. 2007; Calvo et al. 2009). Alcover et al. (2014: 275) report that part-time working is the most frequent form of bridge employment with workers aged over 65 as it enables them to conserve strong links to the world of work and maintain social relationships and personal autonomy. Part-time work involves a shorter working day or work week. It is attractive to two main groups of older workers: the better educated and physically fit as well as those with more limited training and skills. The majority of older workers prefer career-based or organisation-based bridge employment, a preference that is compounded by the difficulty in finding a new job in a new organisation.

Some research relies on existing work and non-work dichotomies to interpret findings regarding late-career part-time work. For example, Hutchens and Grace-Martin (2006: 532) report women tend to be more interested in part-time work than men so phased retirement should be more likely in workforces that are largely female. This does not consider if women prefer working part time but presumes that because they are working part time they must have chosen this. Underemployment in bridge jobs is not taken into account, despite rising levels (Li et al. 2015; Warren 2015b).

Women are found to be more likely to be interested in phased retirement than men, although gender is only one of the factors in the propensity to take up bridge jobs. For example, in a large survey of over 2000 Americans aged over 50, reduced hours was the most attractive condition of phased retirement and employees who worked for someone else were more interested in phased retirement than self-employed people. Workers aged between 50 and 65 were more likely to be interested in phased retirement than those aged over 65 and workers with incomes between US$25,000 and US$75,000 were more likely to be interested in phased retirement than workers with incomes under US$25,000 or over US$75,000 (Brown 2005: 10, 15). Similarly, according to Carr and Kail

(2013: 97), partial retirees in the USA are more likely to be women, more educated, wealthier, healthier, and more active but less likely to be African American or Hispanic.

In Australia, women are more likely to experience partial retirement than men, with 54 % of those leaving full-time employment and shifting to partial retirement being women and 38 % being men (Thomson 2007: 21). Kantarci and Van Soest (2008: 127) found that in northern Europe part-time work among men was common, while in southern Europe self-employment was more common among men. But in the Netherlands, part-time work is perceived to be not suitable for jobs typically done by men so they work full time, while women typically take jobs where part-time work patterns are common and accepted (Kantarci and Van Soest 2008: 136).

Caring responsibilities may be assumed to be a leading factor in the take up of the flexible working arrangements of phased retirement or late career part-time work. However, this is not necessarily the case. In a study on the impact of unpaid work on older workers' transitions out of employment, Carr and Kail (2013) found that the odds of transitioning into part-time work were reduced by starting parental (84 %), grandchild (41 %), and spousal (90 %) caregiving. Individuals who start caregiving are much less likely to work after retirement, but those who engage in volunteering are also likely to work. Thus, the transition to retirement is more likely to be an abrupt event for caregivers and, without support, caring responsibilities are a barrier to continued employment. The example of part-time work and gendered decision making about retirement illustrate that bridge employment is not available to all.

Promotion of late career self-employment is a recent measure aimed at expanding the options for older workers to continue contributing productively to society. Self-employment is a special case of bridge employment that potentially offers more control over work and retirement as well as a means to achieve personal fulfilment and independence (Zhan and Wang 2015: 211–12). It is difficult to clearly define what later life self-employment is as it covers a diverse mix of jobs that may offer flexibility in hours and which may draw on accrued knowledge and experience (Cahill and Quinn 2014). Distinguishing four subtypes of self-employment oriented on knowledge and entrepreneurship may assist policymakers to tailor programmes (Moulton and Scott 2014). Entry to self-employment after retirement is through opportunity not necessity, and like other forms of bridge employment it is more readily available to those who are relatively wealthy and educated, who have entrepreneurial attitudes, and who perceive their retirements to be completely voluntary (van Solinge 2014). Indeed job loss is found to be associated as a 'push' factor with entry into less favourable forms of self-employment, although these differ for women and men concerning a spouse's situation (Moulton and Scott 2016). The potential drawback of self-employment Luckman (2015) argues (for middle-class mothers running micro-businesses) is in the easing of political pressure from empowering women for deeper change. Adopting this point for older people, similarly the potential drawback of later life self-employment, is that it displaces political pressure from empowering older people for deeper change.

## Critiquing Bridge Employment

In welfare states, retirement policies have been reshaped through the provision of flexible working arrangements aimed at enabling older workers to remain in the workforce for longer (Curl and Hokenstad 2006). Bridge jobs are widely promoted as offering flexibility to both employers and employees. Besides formal exit programmes, gradual pathways out of the workforce may be ad hoc. It appears employers readily use ad hoc and informal pathways into bridge employment. While bridge jobs may be fixed term, these offer employers a means of exiting older workers from the core workforce and employees a way to leave voluntarily.

If late career working comprises a distinct stage in the lifecourse, which is arguable, it has been labelled the third age among other terms, with a sense of responsibility or obligation to society to be productive on the part of the individual (Komp 2011). What this fails to encapsulate is that late career employment, while a public policy push in societies with ageing populations, can be regarded as a contingent form of employment as it occurs beyond a working career and, because of this, is arguably not as highly valued as other permanent or core forms of employment. While bridge employment offers a place for older workers it is one that is delineated from mainstream employment. This is especially important for older female workers who may be building their careers, not scaling back their working, at later ages.

The normalisation of bridge employment and expectation that older workers will continue working past traditional retirement ages in any available job may shape negative perceptions of older people as less competent and/or less skilled if they change work patterns or occupations in late career, or as non-productive if they are not engaged in paid work. Equally, retirement may be perceived as inactivity or a kind of unemployment. The value placed on paid work as the most important productive activity, one that potentially overlooks other socially useful and productive non-paid activities, such as family caring and volunteering, skews the potential contributions of older people.

Walker's (1981) political economy of old age perspective provides a starting point for policymakers concerning the social relationship between age and labour market, the inevitability of old age to which the elderly must adjust, and an assumption that with increasing age people withdraw voluntarily. According to Walker a key element of this perspective includes 'Approaches to age and ageing based on the implicit assumption that the elderly can be treated as a distinct social group' (p. 75). In addition insufficient attention is paid to the differential effects of social processes, with Walker identifying an important omission being the neglect of women's transitions to retirement. Perpetuating such negative stereotypes of older people as those with unique needs, Walker further argues, potentially sets up a tension between older people and the rest of society. This may contribute to a tendency to superannuate workers at fixed ages. Another noteworthy element of the political economy perspective is that an individual's employment prospects in later life will probably be determined by their earlier experiences. Thus, unsurprisingly, there is every reason to suppose that labour market inequalities will carry over into old age.

Thus, older workers have been situated as a policy problem for decades. However, we argue that it is more constructive to situate the work as a problem and to problematise its adjustment in terms of both content and structure to suit the needs and expectations of older workers and their employers. Within this new orientation, the focus of late career employment might shift away from labour force participation per se and instead to the quality of jobs. Furthermore, such an orientation might question why older workers should need bridge employment in the first place.

Here it is necessary to identify a number of assumptions that underpin advocacy on behalf of older workers. Firstly, there is an assumption that with age comes decline, even though age is a poor predictor of performance (Warr 1993). Moreover, it is unclear why flexibility is associated with decline for older workers when flexibility offered to female workers is not. Secondly, there is an assumption that older workers will not be able to continue working as they are and they will require adjustments of time and task to enable them to work longer. It is unclear why people cannot continue working as they are.

The changing nature of work does not seem to feature in discussions about bridge employment. Located in this wider debate bridge employment can be viewed less as a 'special' form of employment that is reserved for older workers and more as another manifestation of contingent work. Here it is worth revisiting a question posed by Natti (1993) of temporary employment as a bridge or a trap. This seems to depend on one's perspective. Beehr and Bennett (2015) propose 16 forms of bridge jobs which indicate that bridge employment is not easily defined, highly variable, and something that can be arranged informally to suit both employee and employer. While contingent workers are readily replaceable, bridge job contracts, it is argued, provide stability, security, and control over the timing of retirement in this context. However, Dingemans et al. (2016) question who can access bridge employment and find that only one in four can access it, but those who experienced involuntary career exit were unsuccessful at finding bridge employment.

Understandings of bridge employment are also incomplete: bridge job search is underresearched and the relationship to the adverse effects of under- and unemployment is not well known (Zhan and Wang 2015: 215). There is some evidence that engaging in bridge employment offers possible health benefits (Zhan et al. 2009), although this remains contentious, just as it seems implausible to assume that working at older ages is necessarily an individual good.

Alcover et al. (2014: 281) identify six targets for bridge employment: address population ageing and extension of active life in line with longer life expectancy; underpin viability of pension and social welfare systems; maintain quality of life, health and welfare of older people; retain highly skilled workers and benefit from implicit knowledge they possess; ensure transmission of knowledge and intergenerational relations and succession; and balance lifecycle stages through phases combining different degrees of productive activity in line with changing nature of work and society, which may include self-employment. However, the lexicon of work (and now also of retirement) centres on transitions, pathways, and bridges that are happening at different points throughout an individual career. It is worth asking where bridge retirement fits in when the whole career is a portfolio. Bridge employment is conceptualised as a linear trajectory that shifts an individual from the end of a career and towards retirement, a stage that is entered abruptly at a fixed time. If so, this appears less relevant in an era when retirement is simultaneously conceptualised as blended with work, or more blurred and varied at least and where, for many people, jobs may be characterised as forming bridges to other jobs or not.

Women's retirement is drawn on to provide a competing example. For women, working life and retirement alike involve multiple activities that ebb and flow, autonomy and control of a mix of activities. Bridge employment arguably does not apply well to women's work, to casual employment, or to changing careers a number of times throughout a working life. The changing nature of work means the nature of a career has also changed. One case of bridge employment, for example, occurs in Japan where there is a loss of employment rights after mandatory retirement age at the same time as an expectation that older workers work on. Excusing casualisation of the labour market, vacating the field for workers' rights, and normalising bridge employment each illustrate the reality that working lives are becoming much more fragmented. It is unclear if people in fragmented careers are more likely to engage in bridge employment, but if they have always had stable work, then it is likely that they would prefer to continue in stable work, or be shocked by the transition to bridge employment.

Bridge employment has become normative, so now there is a place for older workers that is delineated but in many cases not part of the mainstream labour market. An older worker may continue to be economically active but there is no concern as to whether the quality of the work is poor. Working longer is considered good in itself without reference to the terms of older workers' relationship with the labour market (Taylor and Earl 2016). Amid a rolling back of the welfare state and the ageing of the population it is sufficient that as few workers as possible access social security at young ages. It is also worth noting here that the societal benefits of phased retirement programmes are, in fact, questionable if they encourage workers to scale back their working hours (Rix 2016).

By contrast, traditional retirement characterised by a homogeneous transition from full-time work and a work oriented identity to full-time retirement and a non-working oriented identity has become non-normative in many developed countries, yet in some places the idea of alternative, varied, and more gradual processes of retirement is not that widespread (Rudolph et al. 2015: 222–223). Even though the idea may be faced with resistance from some, the reality of retirement for the majority of older Americans, for example, involves one or more forms of bridge employment pathways, such as a reduction in working hours in career employment, a change of employers in later life, initially exiting then re-entering the labour force (Cahill et al. 2016). In the context of public policy push to extend working lives, older workers will be faced with continually adjusting their work and retirement decisions so that future retirement patterns are unlikely to resemble those of the past (Giandrea et al. 2009). Indeed the whole concept of 'retirement' is arguably no longer relevant as it implicitly refers to a redundant career breadwinner model that generated it.

## Conclusions

In this chapter we have provided a critique of the concept of bridge employment as applying to an androcentric model of work and post-career employment when the notion of 'career' is under threat from the rise of contingent forms of work. We argue, therefore, that bridge employment has little to say about women's relationship with the labour market, in particular, and about workers generally whose employment does not readily fit within traditional notions of the career. Thus, we question the concept's utility and its relevance. Instead we view it is a further manifestation of the rise of contingent patterns of work and, as such, should be viewed in this context as not being in any way unique. Another, related, limitation of the concept is that it offers no critique of this form of working; that is, it is assumed to represent an individual and social good. Its value in making transitions to retirement more successful requires more critical examination. However, we consider the benefits of bridge employment as potentially highly questionable in terms of job quality, for instance remuneration, opportunities for skills development, and job security. Conceived as economic activity that is 'post-career' also seems to accept and also encourages individual workers to accept that older ages inevitably represent a process or state of decline and withdrawal (Walker 1981). The concept, it seems, has little to say about career development or growth and as a consequence ignores, for instance, women who may be building careers after a period of childrearing at a time when some men's careers may be winding down. Thus we argue that the concept is firmly grounded in ageist assumptions regarding older people's capacities and potential to contribute and, critically, overlooks critical aspects of women's relationship with the labour market.

At a time when the sustainability of social welfare systems is perceived as being under threat owing to population ageing, bridge employment may be viewed as filling the gap between career jobs and full retirement. Ongoing labour market activity, it is supposed, will become the norm as retirement ages are moved further back. However, the literature suggests that bridge employment is likely to be the preserve of a relatively privileged section of the workforce. Even here, we consider there to be areas of concern in terms of the utility of such employment for facilitating successful retirement transitions. For others with fewer choices, paid work may be better categorised as a 'life raft', while for those for whom this is a near impossibility, a lack of social security at a time when pension eligibility is being pushed back means that they may find themselves swimming towards a receding shore.

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[1] Note: Page numbers followed by "n" refer to notes.


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