

Executive summary

The aim of this report is to present a review of research and an outline of research needs in the field of employment participation at higher working age. Following a comprehensive conceptual framework, an interdisciplinary group of forty-six researchers from ten European countries and Canada collected and analysed recent research evidence by topic and country. This final project report presents their findings.

Although differing in pace and magnitude, all European countries are witnessing increasing life expectancies and a compositional shift from younger to older age groups. To sustain economic growth, prosperity and social development, many countries have recognised the need to increase the employment participation of people at higher working age. The degree of urgency is also reflected at all levels of the European policy agenda. The OECD views sustaining economic growth under conditions of population ageing by far as the most pressing global policy challenge for the next fifty years.

While stark differences in the employment levels persist, all countries included in this review display a clear upward trend towards higher participation rates of older workers. However, adjustments to the new demographic realities remain important, and it appears that the largest increases in the employment participation of older workers have to be implemented in those countries, where the magnitude of the demographic challenge is large or very large, and where current participation rates are low (i.e. Austria, Belgium, and Poland) or average (i.e. Canada, Netherlands, and Germany).

On the premise that more and better research could help understand why some people at higher working age are still working while others are not, the General Assembly of the **Joint Programming Initiative “More years, better**

lives” (JPI MYBL) asked a large group of scientific experts from eleven of the fifteen JPI MYBL member countries to identify new research needs that lend themselves to joint research funding activities. The objective of this fast-track project **“Understanding employment participation of older workers” (JPI UEP)** was to define research needs with regard to the employment participation at higher working age by critically reviewing research findings, approaches and methodologies.

The transition from work into retirement is a pressing issue in the public discourse, in policy and in research. What is often being overlooked, however, is that, in many countries, the past two decades have brought forward significant changes in retirement patterns and schemes, which means that retirement today is no clear-cut “one-off” event, but characterised by temporal and conceptual diversity. In other words: Retirement is becoming fragmented.

Further factors contribute to the complexity of retirement: Multilevel interacting influences of society, work and the individual, the processual character of retirement, the dynamism of relevant factors, framework conditions and regulatory changes, and not least the heterogeneity of the older working population.

The reference model and contextual frame of the JPI UEP project was the “lidA conceptual framework on work, age and employment”. It is based on different “domains” that influence decisions about retirement and work. Following a standardised “domain structure”, experts from the JPI UEP working group identified research needs across ten themes (i.e. domains). In parallel, for each participating country, the scientists authored national reports explicitly referring to the ten domains and concluding with specific national research needs. Each domain chapter and national

report is included as a condensed version in this report. Full versions are provided on the project's website: <http://www.jp-demographic.eu/about/fast-track-projects/understanding-employment>.

In an overall assessment of the findings, surprisingly often, similar conclusions for research are drawn across domains and countries. These research needs fall into three priority areas to advance research on the employment participation of older workers, namely to address *conceptual gaps*, close *cross-national gaps*, and fill *thematic gaps*.

Conceptual gap: Bridging the lack of a broad view

A broad view of retirement requires a conceptual framework, which locates retirement within the context of different determinants on the micro, meso and macro level and allows for a life course perspective. However, the JPI UEP working group notes that most studies do not adopt a systems view and multifactorial approach and thus may overlook the emerging theme of retirement fragmentation. This also relates to the frequent lack in specific longitudinal research approaches and the application of life course perspectives. The JPI UEP group also points to the lack of broadly conceptualised cross-national comparative settings in research and the neglect of regions outside North-Western Europe. Lastly, there is a poor coverage of important population subgroups like women, migrants or manual workers, who, in fact, should be at the centre of policy attention. For the advancement of research on the employment participation of older workers, the JPI UEP working group recommends increased multifactorial thinking, more multilevel approaches, the differentiated consideration of exit routes, the consideration of population subgroups and their distinct characteristics in terms of gender, social or occupational status, migration/ethnicity or age, and a general openness as to the selection and combination of methodological approaches.

Regional gap: Levelling of uneven cross-national coverage of research

Research on employment participation of older workers was found to be distributed very unevenly across the review countries. Across almost all domains, the countries with the highest research coverage are Norway and the Netherlands. Canada and Finland also show a high level of research activity in the field. There may be several reasons for this unequal distribution of research; one certainly is that researchers in the Scandinavian countries and the Netherlands benefit from the easy access data to register data.

Filling the thematic gaps in retirement research

There are a number of thematic gaps, which the JPI UEP working group recommends to close by adopting a differentiated view in retirement research and by considering: the role of health in the context of retirement, potential domestic and household factors, new work exposures like the increased use of technology or higher flexibility in work settings and their possible impact on retirement, the role of older women in retirement, the relation between migration and retirement, social position, the employers' perspective; the opportunities for organisational intervention, and the societal costs and gains of policy changes.

These topics listed may be regarded as urgent but exemplifying topics to close thematic gaps by applying a broad view approach and taking advantage of the opportunities for cross-national research. Research initiatives that may contribute to bridging these three gaps would (i) promote knowledge exchange, (ii) reduce duplication of research effort, (iii) maximise the use of research funds and expertise, and (iv) take advantage of the opportunities for comparative studies, and thereby transfer the aims of the JPI MYBL and its Strategic Research Agenda into research practice.

In summary, this project identified a range of gaps and limitations in terms of the available data, the conventionally adopted research approaches, and hence, the validity of existing evidence about employment participation at higher working age. In view of the increasing flexibilisation of work and the individualisation of employment histories and retirement schemes, there appears a general knowledge deficit in a central and multi-faceted phenomenon of social policy and labour market policy. Against the background of ageing and shrinking populations at working age, the regulatory level and policymakers are under increased pressure to develop innovative and socially responsible solutions for work and employment increasingly marked by globalisation, fragmentation and a far-reaching digitisation of processes and products. Forward-looking policy and governance relies on detailed and comprehensive evidence and requires, hence, the closing of this important research gap at the intersection of social policy and labour market policy.

