

**Organizations, managers, and the
employment of older workers after retirement**

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Prof.dr. H.G. van de Werfhorst
Prof.mr. B.E.M. Wientjes
Prof.dr. N. van Yperen

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Organizations, managers, and the employment of older workers after retirement

Organisaties, managers, en het doorwerken van oudere werknemers na pensioen
(met een samenvatting in het Nederlands)

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Jaap Oude Mulders

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te Weerselo

Promotores: Prof.dr. J.J. Schippers
Prof.dr. C.J.I.M. Henkens

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Jaap Oude Mulders

's-Gravenhage, mei 2016

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Chapter 1

Introduction

Introduction

Due to the demographic phenomenon of population aging, the relative share of older workers in the labor market has been increasing, and is projected to increase further in the future (European Commission, 2015). Many governments, including the Dutch government, have introduced policies to discourage early retirement and increase the labor force participation of older workers (OECD, 2015; Sonnet et al., 2014). Indeed, many older workers are now working longer than older workers of previous generations, which is illustrated by higher employment rates among older workers and higher ages at full retirement, and this trend is projected to continue in upcoming decades (European Commission, 2015; OECD, 2015). However, older workers may not always have the choice to postpone their retirement or combine retirement with employment; employers must also be willing to hire and employ older workers. This dissertation focuses on how organizations and individual managers within organizations deal with the employment of older workers, especially in the period after formal retirement.

The issue of post-retirement work, often called ‘bridge employment’ from the employee’s perspective because of its transitional function between a career job and full retirement (Ruhm, 1990), has received growing attention from researchers of different social scientific disciplines. Much of the research in this field has taken the employee’s perspective, and studied for example antecedents and consequences of post-retirement work (e.g., Beehr & Bennett, 2015; Dingemans, 2016; Griffin & Hesketh, 2008; Wang et al., 2008). Research from the employer’s perspective on the employment of older workers, especially post-retirement employment, is relatively scarce. The aim of this dissertation is to address this gap in the literature and address the central research question: *How do organizations and managers deal with the employment of older workers, in particular after retirement?*

This central research question is addressed in four empirical chapters, each with their own specific research question(s), that form the heart of this dissertation. Overall, the research in this dissertation is multidisciplinary in nature, with concepts and insights from different social scientific disciplines applied to research questions about the behavior of organizations and individual managers within organizations regarding the employment of older workers, especially after some form of retirement.

Next to contributing to the scientific literature on the employment of older workers, this dissertation is also societally relevant for a number of reasons. First, population aging is putting

pressure on the pension system in many industrialized countries. In the Netherlands, the state pension age is gradually being raised from 65 to 67 to alleviate the pressure on government pension expenditures (OECD, 2014). With more older workers in the labor market, and those older workers having longer careers than before, it is imperative to understand the considerations that go into an employer's decision to (re)hire an older worker. In addition, employment after some form of formal retirement may be beneficial from a societal perspective because it promotes active and healthy aging, although it may also imply unemployment of other employees due to displacement effects. Therefore, it is important to understand which organizations hire retirees, why they do so, and for what type of work such workers are deployed.

Second, many organizations have to deal with aging of their workforce, and therefore need to pay more attention to age-related issues than before. Although the economic crises of the recent past have prevented the employee shortages that were predicted shortly before the crises, such shortages may still occur in the near future, with relatively many older workers transitioning into retirement and fewer younger workers entering the labor force. It is therefore important for employers to understand the factors that affect the employment of older workers and the decision-making of managers, so that organizations are well suited to employ older workers even after some form of retirement. This research may lead to more awareness among employers regarding the employment of older workers, and adapted behavior when the aging of the workforce continues in coming years.

Third, the findings may be relevant for the older workers of today and of the future. An increasing share of older workers would like to continue working in some capacity after their retirement. However, many of them do not succeed in finding post-retirement work (Dingemans et al., 2016), which leads to involuntary retirement (Dorn & Sousa-Poza, 2010), which in turn leads to lower levels of life satisfaction (Dingemans & Henkens, 2014). Understanding how organizations deal with the employment of older workers and retirees, and understanding which characteristics influence employment decisions of individual hiring managers may lead to employees thinking more consciously about their employment future and being more attentive to keeping their knowledge and skills updated, which may make them more attractive to employers.

This introductory chapter is further structured as follows. First, the demographic and policy context for the research will be described. Then, the earlier research on organizations and their employment of older workers and retirees will be summarized, followed by an explanation of the approach taken in this dissertation to contribute to the literature. Finally, the methodological approach to answering the research questions will be described, followed by a brief outline of the rest of the dissertation.

Demographic and policy context of the employment of older workers

Demographic context

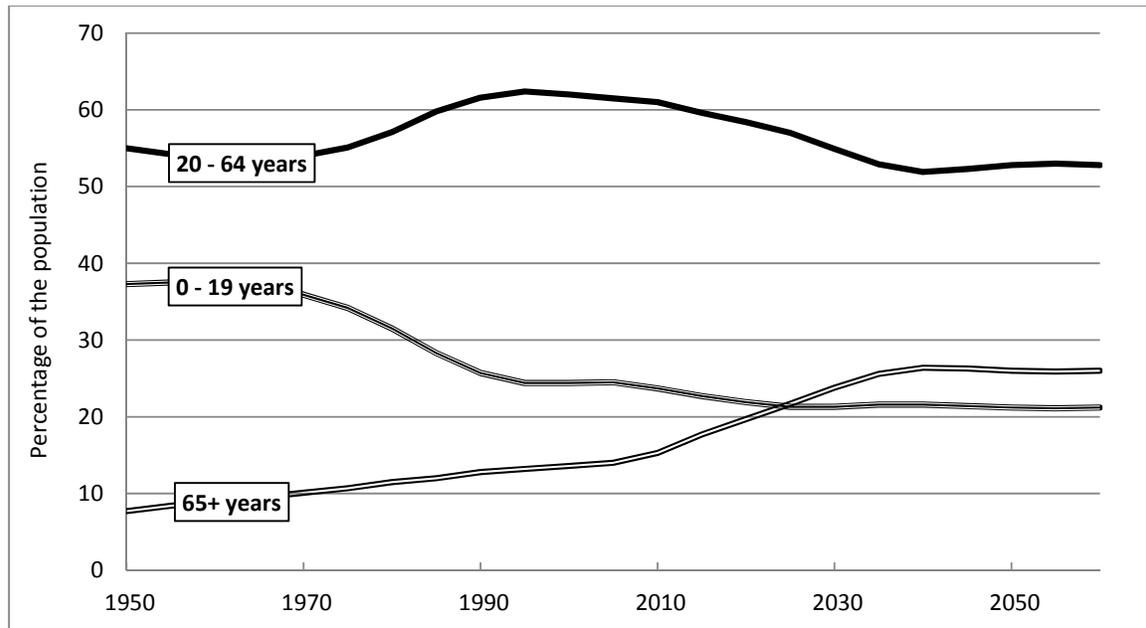
Population aging is the main force driving the need for longer working lives of older workers, because it leads to growing relative shares of older people and declining relative shares of working age people in the population. Population aging is mainly the result of two demographic developments that have coincided in the post-World War II decades: declining fertility rates and increasing life expectancy (Van Nimwegen & Van Praag, 2012). First, fertility rates have declined sharply, mainly between the 1950s and 1980s. Whereas Dutch women who were born in 1935 had on average 2.5 children, women born in 1945 had on average 2 children, and women born in 1965 had on average 1.78 children, a rate which has since stabilized and is projected to remain at this level in the future (Van Duin & Stoeldraijer, 2014a). Second, life expectancy has increased substantially in the same period. Whereas people who reached the age of 65 in 1960 had an average lifetime of 14 (men) or 17 (women) years left, people who reached the age of 65 in 2014 had an average lifetime of 20 (men) or 22 (women) years left, although not all of those years are spent in good health (Van Duin & Stoeldraijer, 2014a). The trend towards longer lives and longer time spent in good health is projected to continue into the future (Van Duin & Stoeldraijer, 2014b).

These two demographic developments are leading to a growing relative size of the group of people outside traditional working age (i.e., aged 65+), and a declining relative size of the group of people in traditional working age (i.e., aged 20-64). This is illustrated in Figure 1.1, which shows how the relative size of the group of people aged 65+ has slowly but gradually increased from 1950 to 2010, after which the increase has accelerated further. At the same time, the relative size of the group of people aged 20-64 peaked around the year 2000, has started to decline, and will continue to decline until approximately 2040. Indeed, Statistics Netherlands projects that population aging will reach its tipping-point in 2040, when there are expected to be 4.8 million people aged 65+ in the Netherlands (3 million now) that will form 26% of the population (18% now; Van Duin & Stoeldraijer, 2014a).

The extent of population aging can be further illustrated by considering old-age dependency ratios over time. Old-age dependency ratios are values that show how many people aged 65+ there are for every 100 people aged 20-64, thereby informing us about the sizes of those age groups relative to each other. In 1950, there were 14 people aged 65+ for every 100 people aged 20-64. This number increased to 20 in 1985, to 25 in 2010, and is currently close to 30. The old-age dependency ratio is expected to increase to 51 in 2040, meaning there will be 51 people aged

65+ for every 100 people aged 20-64, or in other words approximately 2 people in traditional working age for every 1 person above that age (Van Duin & Stoeldraijer, 2014a).

Figure 1.1. Relative sizes of different age groups in the population of the Netherlands, historic figures and forecasts (from 2015 onwards).



Source: Statistics Netherlands (2015a).

However, with changing norms, practices, and regulations about working up to and beyond age 65, the traditional old-age dependency ratio may not be the best measure for population aging. For example, the state pension age in the Netherlands is being gradually increased from 65 to reach 67 in 2021, after which it will be coupled to life expectancy projections of Statistics Netherlands (OECD, 2014). This increase in state pension age will significantly alleviate the costs associated with population aging, as the *dynamic* old-age dependency ratio (which is coupled to the state pension age, instead of the fixed age of 65) is projected to increase to 39 in 2040, after which it is projected to decline to 32 in 2060 (Van Duin & Stoeldraijer, 2014a).

Policy context

Population aging has put pressure on the sustainability of social security and pension systems in most developed countries (OECD, 2015). In the Netherlands, the increase in the state pension age is just one of many employment and retirement-related policy changes that have been implemented in recent years to promote employment participation of older workers and thereby alleviate some of the effects of population aging. This section will describe the basics of the

pension system in the Netherlands, the main policy changes and their origins, and the results in terms of employment participation of older workers.

The Dutch pension system is organized into three ‘pillars’. The first pillar consists of a flat-rate public state pension (Algemene Ouderdomswet, AOW), which was introduced in 1957 for all residents of the Netherlands aged 65 or older. The state pension is largely financed on a pay-as-you-go basis and therefore strongly affected by the effects of population aging. In 2012, a law was passed that gradually raises the eligibility age for the state pension from 65 to reach 67 in 2023 (which was later changed to reach 67 in 2021; OECD, 2014). The second pillar consists of occupational pensions, to which employees and employers contribute during the career of a worker, usually in the form of defined benefit plans. Participation in occupational pension schemes is mandatory in most industries, and as a result, the coverage among wage-and-salary employees is very high. The third pillar of the pension system consists of personal savings, which are especially important for individuals with long spells of self-employment or unemployment, to supplement their lower income from the second pillar. The first and second pillars are most important in determining individuals’ post-retirement income position, whereas the third pillar is relatively less important (Soede, 2012).

In the 1970s and early 1980s, as the large post-World War II generation entered the labor market and economic growth decreased as a result of globalization and geopolitical developments, unemployment was becoming a widespread problem. Collectively financed early retirement schemes (vervroegde uittreding, VUT) were devised to offer older workers an easy exit route and open up their jobs for younger workers. These schemes allowed for older workers to retire several years before reaching the age of 65, and were very generous with high replacement income levels. Older workers could stop working with a minor decrease in income, and organizations could rejuvenate their workforce with lower-earning workers, which resulted in the schemes spreading to all industries and becoming very popular (Euwals et al., 2009; Van Dalen & Henkens, 2002). Next to early retirement schemes, there were generous and flexible ‘alternative pathways’ to early exit from the labor market, most prominently through collectively financed unemployment benefits or disability benefits (Kapteyn & De Vos, 1998), which resulted in a large majority of workers fully retiring from the labor market well before age 65. Indeed, the situation in those years has been described as an ‘early retirement culture’, in which early retirement was encouraged, and even expected of older workers to open up jobs for unemployed younger workers (e.g., Hofäcker & Unt, 2013; P. Taylor & Walker, 1998).

Because early retirement schemes were aimed at opening up jobs for younger workers, there was no incentive for older workers to postpone their retirement (i.e., their benefits did not

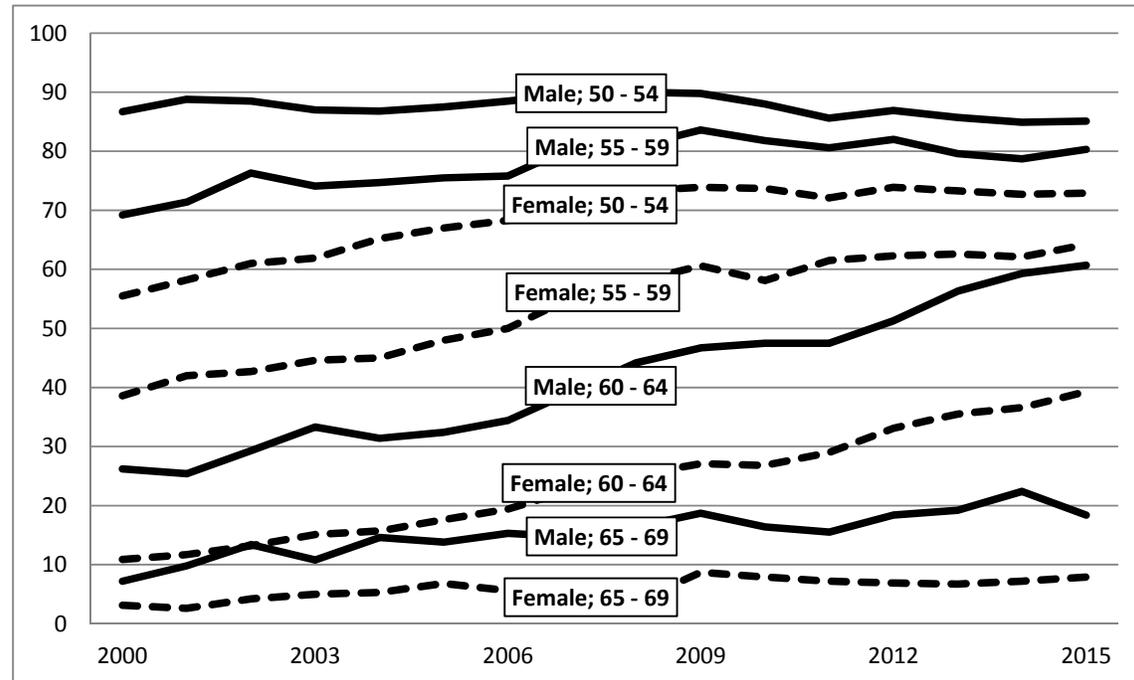
increase with later retirement), they were not allowed to take part-time retirement, and working after early retirement was prohibited (i.e., any income received would be deducted from the early retirement benefits; Van Dalen et al., 2009a). This resulted in very low employment rates for older workers. Around 1990, the employment rate of older workers reached its lowest point, with just over 50% of men and about 20% of women aged 50-65 in employment (Arts & Otten, 2013). While the employment rate of older women had always been low until that time, especially older men were much more often out of employment than in earlier times.

Since the 1990s, however, governments with aging populations have been reforming their employment and retirement policies to stop the trend towards earlier retirement and instead promote longer working lives (OECD, 2006). In the Netherlands, the collectively financed early retirement schemes were first converted to schemes with later retirement ages and a larger component of individual savings (Van Dalen & Henkens, 2002). Later, in 2006, all fiscal advantages for early retirement schemes were discontinued, which effectively ended the government's support for such schemes. Early retirement is still possible, but is now 'actuarially fair', meaning there are severe pension income penalties for taking early retirement, which has made early retirement costly and thus much less attractive than before (Euwals et al., 2010). In addition, the accessibility of disability benefits has been greatly reduced by policy changes, which has made early exit from the labor market even more difficult (Euwals et al., 2012). Finally, as mentioned above, in 2012 it was decided that the state pension eligibility age would gradually increase to 67, after which it will be tied to the life expectancy projections (OECD, 2014; Sonnet et al., 2014).

These policy changes have had a strong effect on employment rates of older workers (Euwals et al., 2010). The increasing labor force participation of older workers is illustrated in Figure 1.2, which shows the employment rates for men and women ages 50-69 in 5-year age groups for the period 2000-2015 in the Netherlands. The increase in employment rate is most pronounced in the age group 60-64, with employment rates growing from approximately 25% to 60% for men and from 10% to 40% for women in the time period 2000-2015. Interestingly, the employment rate of men and women aged 65-69 has also increased considerably, although it is still at a relatively low level. This increase is visible even before the policy change of gradually raising the state pension age to 67, which shows the growing prevalence of working after some form of retirement. In numbers, according to Statistics Netherlands (2016a), there were approximately 168 thousand people before the age of 65, and approximately 239 thousand people aged 65+ combining some form of retirement and employment in 2013. The trend towards later retirement is also evident from the average age at retirement, which has increased

from 61 years in 2006 to 64 years and 5 months in 2015 (Statistics Netherlands, 2016b). With the state pension age gradually increasing and continued population aging, and thus more older workers active in the labor market, the employment rates of older workers are expected to increase further in the near future.

Figure 1.2. Employment rates of older workers in the Netherlands, 2000-2015, by gender and age groups.



Note: Male lines solid; female lines dashed. Employment rates calculated as the percentage of persons that work at least one hour per week for pay.

Source: Eurostat (2015); Labour Force Survey.

Earlier research on organizations' employment of older workers and retirees

With the growing share of older workers in the labor market, scientific interest into the employment of older workers has also increased. A large part of the existing research into the employment participation of older workers has focused on the employee's perspective. These are, for example, studies into older workers' late-life career transitions and timing of retirement, based on for example their health, household situation, expected pension income and expected returns from continued employment. Findings from studies that take this perspective include that relatively healthy, highly educated older workers are more likely to work longer, and that the financial situation of older workers plays an important role in their retirement timing (e.g.,

Damman et al., 2011; Davis, 2003; Dorn & Sousa-Poza, 2010; Gobeski & Beehr, 2009; Kantarci & Van Soest, 2008; Wang et al., 2008).

Research specifically targeting the employment of older workers after some form of retirement has also focused largely on employees. Employment after a ‘career job’, but before full retirement, has been steadily increasing in recent decades, especially in the United States where employment protection and social security coverage are lower, and occupational pensions are not as common as in European countries (Cahill et al., 2015). In the Netherlands, combining employment with some form of pension income, or ‘bridge employment’, is a phenomenon that has been increasing in prevalence and has attracted growing scientific interest in recent years (Dingemans, 2016; Henkens et al., 2013). Findings include that although bridge employment is increasingly common, there are also retirees who want to, but are unable to find a bridge job, especially when they perceived their retirement to be involuntary (Dingemans et al., 2016). Involuntary retirement and being unsuccessful in the pursuit of bridge employment can be detrimental to older individuals’ life satisfaction, whereas successful bridge employment after voluntary retirement can enhance life satisfaction (Dingemans & Henkens, 2014; 2015).

While relatively much is known about the employee’s perspective on retirement and prolonged employment, the employer’s perspective has received somewhat less attention, even though it has been recognized that employers play a key role in shaping opportunities for (prolonged) employment of older workers (e.g., Conen, 2013; Ekerdt, 2010; Henkens & Van Dalen, 2013; Vickerstaff, 2006a). The existing research into the employers’ side of the employment relationship with older workers can be roughly categorized into three research lines. First, there is a research line of mostly large-scale survey research studies into the attitudes, policies, and practices of organizations regarding the employment of older workers. These studies are aimed at mapping attitudes of employers regarding the aging of their workforce (e.g., Guillemard et al., 1996; Remery et al., 2003; P. Taylor & Walker, 1994) or prolonged employment (e.g., Midsundstad, 2011), as well as actual employment behavior of organizations regarding older workers (e.g., Conen et al., 2012b; Harper et al., 2006; P. Taylor et al., 2013). Comparisons of employers’ attitudes or practices are for example made across countries (e.g., Conen et al., 2012b; Harper et al., 2006; Van Dalen et al., 2009b; 2010a), or over time (e.g., Conen et al., 2011). These studies usually rely on a single respondent per organization, and commonly try to survey a representative sample of organizations to allow for generalizations of findings. Limitations of this research line include that most studies are fairly descriptive in nature and cross-sectional, which leads to limited knowledge on what drives the attitudes, policies, and practices of organizations.

In addition, most studies focus on older workers in general, and limited attention has been paid to employment after retirement (one notable exception is Hirshorn and Hoyer, 1994).

Second, there is a research line of qualitative research into employment of older workers and age management practices of organizations. As is characteristic of qualitative research, these studies try to gain a deeper and more holistic understanding of their subjects' behavior through in-depth or focus group interviewing. These case studies usually involve interviews with multiple actors per organization, in order to get several different perspectives on the employment of older workers, for example from top managers, HR managers, line managers, and older workers themselves. Research in this tradition has for example focused on understanding employers' attitudes, policies, and practices regarding older workers in a particular country context (e.g., Germany by Schmähl, 2003; the Netherlands by Conen et al., 2014; Scotland by Loretto & White, 2006), in a specific sector (e.g., IT sector by Brooke, 2009) or set of economic circumstances (e.g., recession by Beck, 2013). In addition, this research line includes for example studies on employee-employer relations regarding retirement decisions of older workers (e.g., Vickerstaff, 2006a; 2006b), best practices in age management policies and practices of organizations (e.g., Frerichs, 2012; Lynch, 2012), or the impact and effects of age-based or age-aware HR policies (e.g., Beck, 2014; Brooke & Taylor, 2005; Earl & Taylor, 2015). A limitation of this type of research is that samples are not representative and results can therefore not be generalized to other organizations. In addition, the in-depth analysis of specific processes or behavior limits the scope of the research.

Third, there is a research line of (quasi-)experimental research into decision-making of employers in different types of employment decisions regarding older workers. This research line is rooted in psychological decision-making literature. Studies in this tradition have shown that older workers are consistently rated more negatively than otherwise equivalent younger workers in, for example, internal evaluations (e.g., Rosen & Jerdee, 1976; Gordon et al., 1988; Lee & Clemons, 1985) and personnel selection for hiring (e.g., Ahmed et al., 2012; Bendick et al., 1999; Lahey, 2008). These experimental studies provide useful insights into psychological processes that influence employment decisions regarding older workers, but the applicability of findings to real world situations is sometimes questionable due to low external validity (Landy, 2008). In recent years, researchers have strengthened this research line with vignette studies, which are quasi-experimental studies among managers that are regularly involved in actual employment decisions. These studies have focused on, for example, hiring decisions regarding older workers (Heyma et al., 2014) or (early) retirees (Karpinska, 2013), retention of older workers (e.g., Henkens et al., 2009) and offering training to older workers (e.g., Fleischmann et al., 2015;

Lazazzara et al., 2013). Limitations of this research line include a limited attention for the effects of the societal and organizational context in which the decisions take place, and a lack of attention for specific types of post-retirement employment, such as employment after mandatory retirement.

Research approach

The research in this dissertation is related to the first and third research lines – survey research and vignette studies. The empirical chapters will address research questions related to both the attitudes, policies, and practices of organizations, and the decision-making of employers regarding the employment of older workers. The research approach in this dissertation is characterized by the following three principles, which are discussed more extensively below:

1. It is important to distinguish between the employment of older workers who have not formally retired and older workers that have retired in some form (e.g., early retirement, mandatory retirement).
2. It is important to consider theoretical insights from different social scientific disciplines to get a better understanding of organizations' and managers' behavior regarding older workers.
3. It is important to study and understand both the behavior of organizations and the behavior of individual managers that make employment decisions within organizations.

1. Employment of older workers before and after retirement

First, it is important to distinguish between the employment of older workers before retirement, and the employment of older workers who have retired in some form. Here, we conceptualize 'retirement' as the receipt of 'retirement income', which can be income from a state pension, an occupational pension or a private pension fund. This is one of the most commonly used conceptualizations of retirement, with the added benefit of allowing the identification of different mechanisms that govern the employment of older workers with or without 'retirement income' (Beehr & Bowling, 2013).

Distinguishing between the employment of 'regular' older workers and retirees is important because of the institutional context of retirement and age-related norms regarding the employment of older workers. Many countries, including the Netherlands, have laws that allow mandatory retirement when employees reach a certain age (e.g., Börsch-Supan et al., 2009; Hofäcker & Unt, 2013). This makes employment of older workers *after* the moment of

mandatory retirement something extraordinary and therefore subject to different influences than employment *before* mandatory retirement. In addition, because work after retirement is relatively uncommon, this type of employment is often not covered by labor laws and collective labor agreements, which may influence the type of considerations that go into the employment of retirees (OECD, 2014). Closely related is the normative context in which decisions regarding the employment of older workers are taken. Individual managers may hold norms about the appropriate timing of retirement, and may behave differently to older workers or retirees that transgress this norm than to older workers or retirees that do not transgress the norm (Radl, 2012; Settersten & Hagestad, 1996).

2. Theoretical insights from different social scientific disciplines

Next, it is important to consider and combine theoretical insights from different social scientific disciplines to get a more well-rounded understanding of organizations' and managers' behavior regarding older workers. Traditionally, researchers from different social scientific disciplines have focused on different theories and included different types of explanatory factors in studies to explain behavior. In this dissertation, theoretical insights from different disciplines are combined, which leads to a more all-round understanding of organizations' and managers' behavior. Although there is not one single overarching theoretical framework, the main theoretical insights are derived from economics (e.g., human capital theory) and sociology (social norms), with added elements from the management and social gerontology literatures. Which concepts are combined in the different empirical chapters depends on the specific question being studied.

Closely related is the examination of explanatory factors of organizations' and managers' behavior on different levels. The explanatory factors that are studied in different combinations in the empirical chapters of this dissertation can be categorized as acting on three levels. First, there is the level of the individual older worker or retiree, whose demographic, human capital-related, psychological or financial characteristics are considered. Second, there are factors at the level of the individual manager within the organization, such as demographic or normative characteristics, or factors pertaining to the manager's job. Third, there are factors at the level of the employing organization, such as factors pertaining to organizational policies or structural or contextual characteristics of the organization.

3. Behavior of organizations and of managers within organizations

Finally, in the study of organizations and the employment of older workers, it is important to distinguish between the behavior of organizations at the meso-level, and the behavior of individual managers within organizations at the micro-level. Studying both organizations and managers is integral to comprehending how they are related and how they shape each other's contexts. This principle stems from the concept of methodological individualism, which states that explanations of social phenomena should include explanations of micro-level behavior and how this aggregates to higher levels (Coleman, 1990).

On the one hand, understanding the behavior of organizations is crucial, because organizations are the employing entity, and the behavior of organizations must be understood to understand social phenomena at the macro level. In addition, organizations have their own dynamics that influence practices, which may easily be overlooked in the study of individual behavior of managers. For example, organizations' policies and practices may be influenced by collective bargaining agreements (e.g., Deelen & Euwals, 2014), or internal and external dynamics may lead organizations to display isomorphic tendencies (DiMaggio & Powell, 1983).

On the other hand, understanding the behavior of individual managers within organizations is imperative, because it is their behavior that aggregates into how organizations as a whole deal with older workers. Managers are agents that are expected to act in line with and contribute to organizational goals such as profit maximization and continuity (Kalleberg et al., 1996), whose behavior is influenced and at the same time restricted by their organizational context. However, managers are also individuals with their own preferences, values, norms, and stereotypes, which may affect their decisions regarding older workers.

Methodological approach

Two different types of research questions are addressed in the empirical chapters of this dissertation, with two complementing methods of data collection and analyses. First, to address research questions on the relationships between organizations' characteristics, policies, and their employment practices regarding older workers, survey data are used. Surveys are suitable to obtain data from relatively large and representative samples. Here, survey data are used from a questionnaire conducted among employers in the Netherlands and various other European countries in 2009. Second, to address research questions about the relationships between managers' norms, employee characteristics, and managers' decision-making regarding the employment of older workers, the vignette research method was used, which combines survey and experimental methods. The vignette data used here were obtained from a sample of

Dutch managers in 2013 (partly complemented with similar data from 2010). Each method is elaborated on below.

Survey research

Large-scale survey research among employers has been one of the main methods to quantitatively assess employers' practices and attitudes regarding older workers (e.g., Harper et al., 2006; Hirshorn & Hoyer, 1994; Remery et al., 2003; P. Taylor & Walker, 1994). Survey research has the advantage of making it relatively easy to collect uniform information from a large number of respondents, thereby allowing researchers to discover statistical relationships that may go unnoticed in small-scale observational research. Survey research is the most appropriate method for obtaining information about attitudes, policies and behavior of organizations. However, it is less suitable for asking specific questions about individual employees or assessing individual managers' behavior in very specific situations. Therefore, survey data were used in this dissertation to answer research questions pertaining to the practices, policies, and attitudes of organizations regarding the employment of older workers and retirees.

The survey data that are used in this dissertation were collected within the 'Activating Senior Potential in Ageing Europe' (ASPA) project that was funded in the EU's Seventh Framework Programme. This survey was conducted among a sample of organizations in eight European countries between February and November of 2009. The entire data collection was coordinated and the Dutch part of these data were collected by a collaborative team from the Utrecht University School of Economics and the Netherlands Interdisciplinary Demographic Institute. I did not personally have a role in the survey design or data collection. A more comprehensive overview of this research project, and more detailed information about the data collection can be found in the dissertation of Conen (2013).

Chapters 2 and 5 of this dissertation use data from this survey. In chapter 2, only the Dutch part of these data are used for analysis, since a section with additional questions about the employment of early retirees was only included in the questionnaire in the Netherlands. In chapter 5, data are used from Denmark, Germany, Italy, the Netherlands, Poland, and Sweden. Data from France and the United Kingdom were excluded here because the surveys in those countries omitted several essential questions regarding the age-related workplace norms of managers. More specific information about response rates, procedures, and data handling can be found in these chapters.

Vignette research

Vignette research (also known as the factorial survey method) is a quasi-experimental research method that is particularly useful for uncovering the underlying structure of human judgments in social contexts (Rossi & Anderson, 1982; Wallander, 2009). Experimental principles are combined with survey methods to elicit judgments in the study's respondents, which allows researchers to study which factors influence a judgment or decision. In a vignette study, respondents are shown several vignettes, which are fictional descriptions of persons or situations, on which they are asked to make a certain judgment or decision. The characteristics of the person or situation are manipulated as in an experiment, to allow researchers to determine the effects of the independent variables on the judgment independently. The vignette research method has been used increasingly in social science research in the past 30 years (Wallander, 2009), and has also been applied to study managers' decision-making regarding older workers in recent years (e.g., Henkens et al., 2009; Karpinska, 2013). The vignette method is suitable for studying individual behavior of managers in very particular situations that they may not experience often, as long as care is taken to create a realistic context and provide realistic and appropriate information (Hainmueller et al., 2015; Landy, 2008). In this dissertation, I use vignette data to study research questions pertaining to individual managers' behavior regarding the employment of older workers and retirees in different contexts.

The vignette research data that are used in this dissertation were collected in May of 2013 among a sample of Dutch managers of the Longitudinal Internet Studies for the Social Sciences (LISS) panel, which is operated by CentERdata of Tilburg University, and consists of a representative sample of Dutch inhabitants (Scherpenzeel & Das, 2010). I collaborated with colleagues from the Netherlands Interdisciplinary Demographic Institute to design the vignettes and the accompanying questions. For the data collection, panel participants that worked in management positions were selected and asked to complete a series of vignette experiments. In these vignette studies, participants were shown a description of an older worker in a particular situation (e.g., asking to be rehired after mandatory retirement, and applying for a job pre-retirement), and were asked how likely they would be to interview or hire the older worker. Because respondents completed multiple vignettes, where characteristics of the older worker on the vignette were randomized, multilevel regression techniques were used to analyze the data (Snijders & Bosker, 1999).

Chapters 3 and 4 of this dissertation use data from these vignette experiments. In chapter 3, data are used from a vignette study in which managers were asked to judge a situation involving an older worker that was forced to take mandatory retirement, but wanted to return to their

organization. The retiree's openness to a flexible type of labor contract and their willingness to accept a lower wage were among the characteristics that were manipulated. In chapter 4, data are used from a vignette study in which managers were asked to evaluate job applications from (pre-retirement) older workers. The data of this study were combined with data from the same study that was conducted amongst (partly) the same sample in April of 2010. This way, we were able to construct a longitudinal data set, and investigate whether managers' judgments changed from 2010 to 2013, years between which the economy was in recession and where the labor market in particular did not function smoothly. More specific information about response rates, retention, and procedures can be found in these chapters.

Outline of the dissertation

Chapters 2 through 5 report on the empirical studies of this dissertation, and chapter 6 concludes and discusses the findings and implications. The empirical chapters were written as stand-alone journal articles, which means they can be read independently, but also that there is some overlap between them. Chapters 2, 3, and 5 have been published, and chapter 4 has been invited to be revised and resubmitted to an international peer-reviewed journal.

Chapter 2 presents a classification of the different ways that Dutch organizations employ early retirees. Their employment practices are then related to their application of age-based human resource policies and structural organizational characteristics.

Chapter 3 presents a study on Dutch managers' decisions regarding employees that faced mandatory retirement, but asked to be rehired. The employees' wage and contract flexibility, along with several other characteristics of both employee and employer, are seen to influence managers' decisions.

Chapter 4 presents a study on Dutch managers' interview invitation decisions regarding (pre-retirement) older job applicants. The focus lies with the job applicants' human capital-related characteristics and effects of the general economic conditions and the managers' perception of changes in job demands on the managers' decision whether or not to invite the older job applicant for an interview.

Chapter 5 presents a study on organizations' recruitment and retention practices regarding older workers and retirees in six European countries. The role of top managers and their age-related workplace norms is central in explaining organizations' practices in this study.

Finally, chapter 6 summarizes and ties together the findings of the empirical chapters. Furthermore, it evaluates the research approach that was taken in this dissertation, and discusses the relevance and the societal implications of the findings.

Chapter 2

Organizations' ways of employing early retirees:

The role of age-based HR policies

Jaap Oude Mulders, Kène Henkens, & Joop Schippers

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Abstract

We examine whether from an organizational perspective it is possible to distinguish different ways of employing early retirees, and explore how the employment of early retirees is related to the application of four age-based human resource policies, namely demotion, offering training opportunities to older workers, offering early retirement, and allowing flexible working hours. We perform a latent class analysis on a sample of 998 Dutch organizations in order to categorize them based on three dimensions of their employment of early retirees. We then run a multinomial logistic regression to relate the employment of early retirees to the four age-based human resource policies. We distinguish four types of organizations based on their way of employing early retirees: non-users (52.6%), users for mainly standard work (20.8%), users for mainly non-standard work (9.8%), and users for standard and non-standard work (16.7%). We find that organizations that apply demotion, offer early retirement, and allow flexible working hours are more likely to be users for mainly standard work. Also, organizations that do not offer early retirement are less likely to employ early retirees. Age-based human resource policies, especially demotion, offering early retirement, and allowing flexible working hours, are conducive to the employment of early retirees for mainly standard work. Broader implementation of these policies may provide opportunities for older workers to make a more gradual transition from work to retirement.

Introduction

The process of retirement has changed in recent years. For many older workers, retirement is no longer a one-off irreversible event, but rather a more gradual transition from full-time employment to full retirement (Wang & Shultz, 2010). Work undertaken in this transitional period is termed 'bridge employment' (Feldman, 1994; Ruhm, 1990), in which an increasing number of older workers now partake. For example, Cahill, Giandrea, and Quinn (2006) reported that between a third and a half of US workers hold at least one 'bridge job' during their lifetimes.

Previous research has shown that bridge employment is highly diverse and multidimensional. Employees may be able to retire part-time while staying employed in the same organization (termed 'phased retirement'; e.g., Hutchens & Grace-Martin, 2006), seek similar employment with a different employer, or pursue a career in an unrelated field (e.g., Davis, 2003; Wang et al., 2008). In addition, there is evidence that bridge employment occurs in different types of employment arrangements, such as steady part-time, temporary (e.g., seasonal), and on-call arrangements (e.g., Lain, 2012; Shultz, 2001).

Most studies of the employment of (early) retirees have approached bridge employment from an individual decision-making perspective and have related the type of bridge employment to individual employees' antecedents, such as health, age, and education; and outcomes, such as satisfaction in retirement and with life in general (e.g., S. Kim & Feldman, 2000; Wang et al., 2008). In comparatively few studies has attention been devoted to the demand side of the labor market and to the crucial role that organizations play in the process of retirement (Henkens & Van Dalen, 2013). Exceptions include the contribution of Hirshorn and Hoyer (1994), who found that almost half of the US organizations they surveyed employed retirees in the early 1990s, although only a fraction had formal policies on the employment of retirees; and the contribution of Karpinska, Henkens and Schippers (2011), who showed in an experimental study that many managers are reluctant to hire early retirees. However, it remains unclear how organizations shape opportunities for different types of bridge employment and how practices of the employment of early retirees are embedded in broader organizational approaches to employment and human resource policies.

The present study adopts an organizational point of view regarding the employment of early retirees and involves a large-scale empirical study into organizational practices in the Netherlands. Specifically, it examines how frequently organizations employ early retirees, for what type of work early retirees are deployed, and whether or not they are paid for their services. We study the co-occurrence of organizations' practices on these three dimensions with a latent class analysis (LCA). The LCA allows us to consider these practices simultaneously in order to identify

differences on the latent construct (i.e., the way of employing early retirees). We then relate these different organizational approaches in a multinomial logistic regression to organizations' application of four age-based human resource (HR) policies aimed at permanent staff, namely demotion, offering training opportunities to older workers, offering early retirement, and allowing flexible working hours.

Our first research question is whether, from an organizational perspective, different ways of employing early retirees can be empirically distinguished and if so how they differ. Our second research question is how the application of age-based HR policies towards permanent staff affects organizations' employment practices regarding early retirees.

With this study, we contribute to the literature in three ways. Firstly, by surveying organizations' practices with regard to the employment of early retirees, we quantitatively examine the demand side of the labor market for this group. Secondly, rather than focusing solely on whether or not organizations employ early retirees, we take a broader perspective by also considering the type of work this group is deployed for and the payment it receives. This novel approach allows us to view the diversity of post-retirement employment arrangements from the organizational perspective. Finally, we investigate how the employment of early retirees is related to organizations' application of age-based HR policies towards permanent staff, thereby relating the employment of early retirees to firms' broader organizational practices and policies.

The present study took place in the Netherlands. Here the pension system is characterized by mandatory retirement and the receipt of a state pension at the age of 65 (rising gradually to 67 in 2023). Additionally, most employees are covered by defined benefit occupational pensions. Starting in the late 1970s, early retirement schemes in the Netherlands were financed on a pay-as-you-go basis and laws were passed that made early retirement financially attractive. These schemes did not allow for paid labor because they aimed at opening up jobs to younger workers, and naturally led to very low labor market participation rates of older workers.

Since the late 1990s, however, the Dutch government has passed a number of laws that have made early retirement less financially attractive and that have removed the obstacles for continued employment after (early) retirement (Euwals et al., 2009; Van Dalen & Henkens, 2002). In the current system, early retirement schemes are integrated with occupational pensions. Most such occupational pension schemes, which are typically organized by sector, allow for actuarially fair early retirement and do not restrict employment after early retirement (Euwals et al., 2009). In the current study, we therefore define employment of early retirees as organizations employing individuals below the age of 65 that receive private pension benefits. For organizations the employment of early retirees thus implies a formal (re)negotiation of a labor

contract regardless of whether the individual was employed by the organization at the time of taking early retirement.

Dimensions of bridge employment from an organizational perspective

The three organizational practices considered herein (how frequently firms employ early retirees, the type of work they are deployed for, and their payment) are characteristic of organizational approaches to dealing with early retirees. Although previous studies have indicated how organizations may differ on these three practices, it is thus far unclear how these dimensions may co-occur. Therefore, we cannot predict how many organizational approaches to dealing with early retirees might emerge from the LCA. Still, based on insights from the literature, we can form some expectations as to how organizations differ on these three dimensions.

Firstly, we consider an organizations' *frequency of employing early retirees*. Applying labor queue theory (Reskin & Roos, 1990; Thurow, 1975), we assume that organizations rank applicants based on the match between the job requirements and applicants' (estimated) productivity and workload preferences. Because early retirees receive a pension income related to their average or final salaries, they are considered less dependent on their wage than normal employees (although they may still want to supplement their pension incomes). On the one hand, these pension benefits provide both the employee and the organization with flexibility in the employment relation. This, along with their specific skills, experience, and/or willingness to work in part-time jobs, may place early retirees at the top of the labor 'queue'. On the other hand, the stereotypical perception that older workers display low productivity and cannot cope with new technologies (e.g., Van Dalen et al., 2010b) may lower their position in the labor queue.

Secondly, we consider whether organizations deploy early retirees in four *types of work*: regular work, odd jobs (defined as tasks that would otherwise be neglected), on-call work, and work at irregular hours. Hirshorn and Hoyer (1994) showed that in the early 1990s, most US organizations that employed retirees deployed them for "work in regularly performed operational tasks" (94%). However, their study also found that many organizations also deployed retirees for "special irregularly occurring projects" (56%) and "filling in as demand for production/service increases" (39%).

This employment of (early) retirees for flexible work is becoming increasingly common. For example, Lain (2012) showed that UK organizations predominantly employ retirees in low-paid jobs that require few formal qualifications but demand a high level of flexibility on the part of the employee (i.e., on-call work). Such employment of (early) retirees in non-standard employment arrangements (Kalleberg, 2000) could be part of a labor market-wide development towards more

contingent employment (De Vries & Wolbers, 2005; Kalleberg et al., 2000). Some scholars consider such contingent employment arrangements for (early) retirees necessary to help overcome the low level of labor participation by older workers (e.g., Shultz, 2001).

Thirdly, we consider the *payment of early retirees*. We examine whether organizations pay early retirees or whether bridge employment in their firms is a form of unwaged labor. Although unwaged labor is not recognized in the traditional conceptualization of work (R.F. Taylor, 2004), it is quite common for workers of all ages in the voluntary sector (see e.g. Kaskie, Imhof, Cavanaugh, & Culp, 2008 for a discussion of different types of volunteering for older adults), and may be a solution for some (early) retirees to keep working in the private and public sector (Rotolo & Wilson, 2006; R.F. Taylor, 2004). Note that in this study we focus strictly on the private and public sector and do not examine voluntary organizations. Early retirees may have non-financial motives to keep participating in work, such as social (interaction), personal (self-fulfillment), and generative (desire to pass on knowledge to younger generations) motives (Mor-Barak, 1995). When private pension income is sufficient and a paid bridge job, that also satisfies non-financial motives to work, is not available, early retirees may be willing to perform unwaged labor.

HR policies

The application of age-based HR policies towards permanent staff signals an organization's strategic purposes and intentions with respect to older workers and (early) retirees (Rau & Adams, 2013). HR policies geared towards the retention of permanent staff may influence organizations' employment of early retirees in two ways: (a) by encouraging permanent staff into early retirement, after which some may be rehired by the organization; and (b) by attracting external early retirees to apply for bridge jobs in the organization. For example, Armstrong-Stassen (2008b) and Rau and Adams (2005) found that organizations' HR policies on flexible working opportunities are positively related to (early) retirees' willingness to pursue bridge employment in a firm. In the present study, as noted earlier, we examine how four age-based HR policies are related to organizations' employment practices with regard to early retirees, namely demotion, offering training opportunities to older workers, offering early retirement, and allowing flexible working hours.

Firstly, *demotion* is the practice of reducing an employee's responsibilities and wage in response to a decline in productivity. Because demotion conflicts with the standard view of seniority wages, it is considered to be taboo in most circumstances and thus only rarely applied. For example, Henkens and Schippers (2008) found that only 6% of Dutch organizations applied

demotion between 2000 and 2005. Although this study showed that many more organizations would consider demoting workers in the future, firms remain reluctant to do so because demotion negatively affects job satisfaction and can lower productivity even further (Josten & Schalk, 2010). However, when demotion is a feasible option, organizations may use it to balance the rising costs and (perceived) declining productivity of older workers in order to extend workers' careers. We therefore expect that organizations that apply demotion are more committed to extending the careers of their older workers and thus more likely to employ early retirees in some capacity.

Secondly, we consider an organization's policy towards *offering training opportunities to older workers* in order to rebalance their costs and productivity. Karpinska (2013) showed that managers are generally reluctant to offer training opportunities to older workers because of the limited scope for a return on investment. We therefore expect that organizations that offer training opportunities to older workers are more likely to employ early retirees in some capacity, because they show commitment to retaining their older employees.

Thirdly, we consider whether organizations *offer early retirement* to employees. Although employees are essentially free to take early retirement in the Netherlands insofar as their occupational pension schemes allow, organizations may offer extra benefits to make early retirement more attractive. According to Feldman (1994), offering early retirement reduces uncertainty for employees, which makes them more likely to retire and take up subsequent bridge employment in the same organization. From an organizational perspective, offering an attractive early retirement scheme may be a way to remove older workers from the labor force, but in combination with offering a bridge job may also help retain valuable older workers who would otherwise have retired completely or taken up bridge employment elsewhere (Hutchens & Grace-Martin, 2006; Vickerstaff et al., 2003). We are therefore unsure about the effect of offering early retirement on the way of employing early retirees.

Finally, we consider whether organizations *allow flexible working hours* in order for employees to balance work with private responsibilities or leisure activities, which is specifically valuable for early retirees who may have caring responsibilities or may want more free time (Frerichs et al., 2012). However, flexible working hours are not feasible in all jobs and its availability depends on the nature of the work and the job design within an organization. For example, Hutchens and Grace-Martin (2006) found that organizations are unlikely to offer part-time retirement to employees when work is generally carried out in teams. Nevertheless, allowing flexible working hours is an established means to attract early retirees to an organization (Armstrong-Stassen,

2008b; Rau & Adams, 2005). We therefore expect organizations that allow flexible working hours to recruit more early retirees.

Design and Methods

Data

Between February and May 2009 a hard-copy survey was posted to a sample of 4700 Dutch organizations. The sample was stratified by sector and size, and two reminders to participate were sent to ensure sufficient respondents from a range of different organizations. The survey was completed by directors (41%), general managers (10%), HR managers (34%) or other employees (15%). Altogether, 1077 Dutch organizations responded for a response rate of 23%, which is comparable to other large-scale employer surveys in organizational research (Baruch & Holtom, 2008). Due to our sampling approach, large organizations and public sector organizations are overrepresented, whereas small organizations and organizations in the services and trade sector are underrepresented. Descriptive results are therefore not completely representative of all Dutch organizations according to size and sector. However, we control for these characteristics in our multivariate analysis.

Respondents who did not complete the questions on their organization's employment of early retirees ($n = 79$) were excluded from the analysis, leaving 998 participants for the LCA. Item nonresponse for the independent variables in the multinomial logistic regression analysis was low ($<3.5\%$). Cases with missing values were therefore deleted, leaving us with 925 participants for the multinomial logistic regression analysis.

Measures

Dependent variable. Organizations' employment of early retirees consisted of three dimensions. First, *frequency of employment* was assessed with the question "Does your organization employ early retirees?", with the possible answers "No, never", "Yes, occasionally", and "Yes, frequently". If answered affirmatively, respondents were asked to what extent early retirees were deployed for the four investigated *types of work*, namely regular work, odd jobs, on-call work, and work at irregular hours. For each type, respondents were asked to answer on the four-point scale "Not at all", "Occasionally", "Regularly", and "Very regularly". Thirdly, the *payment of early retirees* was assessed with the question "Do the early retirees you employ get paid?", with the answering categories "No", "Just the reimbursement of expenses", and "Yes".

Independent variables. The application of the four relevant HR policies (demotion, offering training opportunities to older workers, offering early retirement, and allowing flexible working

hours) was measured by asking the following question: “Which of these policies are applied in your organization?”. The answers were coded 1 if applied at the current moment and 0 if not.

We also controlled for a number of organizational characteristics in the multinomial logistic regression analysis. We included important background characteristics such as sector and size, a number of workforce characteristics, and a question on whether the organization had recently faced difficulties finding suitable employees. Table 2.1 provides background information on the independent variables.

Table 2.1. Means, standard deviations, and wording of the independent variables.

	Mean or %	S.D.	Wording (translated from Dutch)
Age-based HR policies			
Demotion	0.09	0.28	
Offering training to older workers	0.15	0.35	
Offering early retirement	0.56	0.50	“Which of these policies are applied in your organization?” (0 = no; 1 = yes)
Allowing flexible working hours	0.45	0.50	
Organizational characteristics			
Sector			
Industry and construction	34.97%		“In which sector does your organization operate?” 18 answering categories divided into three main sectors and one ‘other’ category.
Services and trade	32.67%		
(Semi-)public sector	30.06%		
Other	2.30%		
Size			
2–25 employees	23.45%	16711.66	“How many employees are currently employed by your organization?” Divided into categories to facilitate interpretation.
26–75 employees	21.34%		
76–200 employees	19.04%		
> 200 employees	36.17%		
Workforce characteristics			
Percentage of older workers (aged 50+)	23.12	15.52	“What percentage of your workforce consists of older workers/highly educated workers/workers with fixed-term contracts/workers with part-time contracts?”
Percentage of highly educated workers	18.40	26.63	
Percentage with fixed-term contracts	12.74	16.05	
Percentage with part-time contracts	31.59	27.56	
Difficulty finding suitable employees			
Never	43.20%		“Has your organization recently faced difficulties finding employees?”
For some positions	47.63%		
For relatively many positions	9.16%		

Analyses

Firstly, we performed a latent class analysis (LCA) to test whether organizations could be categorized based on their way of employing early retirees. An LCA is an appropriate method for discovering and distinguishing unobserved subpopulations or categories of respondents that differ on some latent construct, in this case organizations' ways of employing early retirees, by looking at response patterns over multiple indicator variables, in this case the frequency of employment of early retirees, the type of work they are deployed for, and whether they are paid (Collins & Lanza, 2010; Hagenaaars & Halman, 1989). In an exploratory LCA, where the number of different classes and their sizes are unknown, the customary procedure is to estimate several models that have a different number of classes and then compare the model fit statistics to determine which offers the best representation of the data (Collins & Lanza, 2010). We performed LCA with the program Latent GOLD 4.0 (Vermunt & Magidson, 2005).

Because LCA draws on the frequency of all possible response patterns in the data, it is often necessary to limit the number of indicator variables in order to simplify the number of answer possibilities (Collins & Lanza, 2010). Too many possible response patterns mean that models do not converge, rendering the interpretation of the output impossible. It is therefore customary to dichotomize ordinal variables. We dichotomized two dimensions: *type of work* (0 for 'Not at all' and 1 for 'Occasionally', 'Regularly', and 'Very regularly') and *payment of early retirees* (0 for 'No' and 'Just the reimbursement of expenses' and 1 for 'Yes'). We did not dichotomize *frequency of employment* because of its importance for class interpretation; rather, we treated this dimension as an ordinal variable.

Secondly, we performed a multinomial logistic regression to analyze the relationship between organizations' application of age-based HR policies and organizational characteristics and the different practices with regard to the employment of early retirees. The dependent variable in the multinomial logistic regression consisted of the class assignments of the LCA model that was found to best represent the data. Because LCA produces a number of nominally different classes that cannot be ordered on a continuum, multinomial logistic regression is an appropriate follow-up analysis to test the effects of the independent variables on organizations' assignment to one of these classes. To compare the effects of the independent variables on all latent classes simultaneously we present the average marginal effects, which indicate how the latent class probabilities change with a change of one unit in the independent variable, averaged over all organizations (i.e., without fixing the independent variables on some value; Bartus, 2005). The marginal effects of each independent variable sum to zero.

Results

Different ways of employing early retirees

Descriptive information on organizations' employment of early retirees is presented in Table 2.2. Approximately half (47%) of the organizations in the sample employ early retirees, with the majority indicating that they only employ retirees occasionally. Most organizations that employ early retirees deploy them for regular work (82%), while fewer, but still a majority, deploy them for odd jobs (64%) and on-call work (57%). By contrast, only 15% of organizations deploy early retirees for work at irregular hours, and most do so only occasionally. It is further noteworthy that approximately one in seven organizations that employ early retirees do not pay them or only reimburse their expenses. This finding has rarely been acknowledged in research outside the voluntary sector (R.F. Taylor, 2004).

Table 2.2. Descriptive characteristics of organizations' employment of early retirees (N = 998).

Frequency of employment				
No, never	52.61%			
Yes, occasionally	37.27%			
Yes, frequently	10.12%			
Type of work *	Regular work	Odd jobs	On-call work	Irregular hours
Not at all	18.39%	36.36%	42.71%	84.99%
Occasionally	16.28%	21.99%	18.60%	9.51%
Regularly	26.22%	27.70%	20.51%	4.86%
Very regularly	39.11%	13.95%	18.18%	0.63%
Payment of early retirees ^a				
No	4.44%			
Just the reimbursement of expenses	9.09%			
Yes	86.47%			

* *Note:* Organizations that did not employ early retirees excluded

Table 2.3 presents the model fit statistics of the estimated models with up to five latent classes. The p -value and Bayesian Information Criterion (BIC) were used to identify the ideal number of classes: the p -value should be non-significant, while the BIC should be as low as possible (Collins & Lanza, 2010). The model with four latent classes satisfied both criteria and thus offered the best representation of the data. Robustness checks with slightly different operationalizations of the indicator variables consistently showed that the four-class model best represented the data, supporting our choice of this model for the analysis.

Table 2.3. Model fit statistics for the latent class analysis (N = 998).

Classes	df	L ²	p-value	BIC
1	88	3263.63	0,00	7503.88
2	81	171.92	0,00	4460.50
3	74	118.70	0,00	4455.63
4	67	61.38	0,67	4446.65
5	60	46.93	0,89	4480.54

Table 2.4 presents the latent class prevalence and item-response probability statistics for the four-class model. The latent class prevalence statistics indicate the occurrence of that class in the sample. The first class contains 52.6% of organizations, the second class 20.8%, the third class 9.8%, and the fourth class 16.7%. The item-response probability coefficients indicate for each of the four classes separately the likelihood that organizations that belong to that class score on the underlying item. For example, for organizations in the second latent class, there is a 99% likelihood that they employ early retirees for regular work. Based on the coefficient patterns over the multiple indicators, the following labels were assigned to the different types of organizations: (1) non-users, (2) users for mainly standard work, (3) users for mainly non-standard work, and (4) users for standard and non-standard work.

Table 2.4. Latent class analysis of organizations' way of employing early retirees (N = 998).

	Class 1	Class 2	Class 3	Class 4
	Non-users	Users for mainly standard work	Users for mainly non-standard work	Users for standard and non-standard work
<i>Item-response probabilities</i>				
<i>Frequency of employment</i>				
Never	1.00	0.00	0.00	0.00
Occasionally	0.00	0.84	0.89	0.65
Frequently	0.00	0.16	0.11	0.35
Regular work *	0.00	0.99	0.34	0.92
Odd jobs *	0.00	0.44	0.78	0.79
On-call work *	0.00	0.39	0.46	0.87
Irregular hours *	0.00	0.00	0.05	0.39
Paid *	0.00	0.98	0.57	0.91
<i>Latent class prevalence</i>	52.6%	20.8%	9.8%	16.7%

* *Note:* Dummy variable

Organizations of the first type, *non-users*, are easily identified and characterized. They simply do not employ early retirees. The remaining half of the sample, organizations that do employ early retirees, can be divided into the following three types.

Users for mainly standard work are characterized by the occasional employment of early retirees (84% occasionally, 16% frequently) and a very high likelihood of deploying them for regular work (99%) compared with odd jobs (44%), on-call work (39%), and work at irregular hours (0%). Moreover, virtually all the organizations in this class pay their early retirees (98%). They make up approximately 20% of the sample.

Users for mainly non-standard work are similarly characterized by the occasional employment of early retirees (89% occasionally, 11% frequently). However, in contrast to the preceding class they are much less likely to deploy early retirees for regular work (34%), but more likely to deploy them for the other types of work (78% for odd jobs, 46% for on-call work, and 5% for work at irregular hours). Furthermore, users for mainly non-standard work are comparatively likely to employ early retirees as a form of unwaged labor (57% chance of paid employment). Users for mainly non-standard work comprise approximately 11% of the sample.

Finally, *users for standard and non-standard work* are characterized by a comparatively high likelihood of employing early retirees on a regular basis (65% occasionally, 35% frequently). While they have a high likelihood of deploying early retirees for regular work (92%), the other types of work are also common compared with the two previous classes (79% for odd jobs, 87% for on-call work, and 39% for work at irregular hours). They are also characterized by a high likelihood of paying their early retirees (91%). They make up approximately 17% of the sample.

The employment of early retirees: the role of HR policies

Table 2.5 presents the results of the multinomial logistic regression, and relates organizations' ways of employing early retirees to the application of the four age-based HR policies discussed earlier after controlling for a number of organizational characteristics. The dependent variable consists of the class assignments of the four-class LCA model.

Firstly, organizations that practice demotion are more likely to fall into the users for mainly standard work class; there is no significant effect for any of the remaining three classes. Secondly, offering training opportunities to older workers does not affect the employment of early retirees. Thirdly, offering early retirement is negatively related to not employing early retirees, but positively related to the users for mainly standard work class. This finding implies that organizations that offer attractive early retirement schemes to their employees do not do so exclusively to remove older workers from the workforce (i.e., they are not opposed to employing

Table 2.5. Predictors of the four ways of employing early retirees: Average marginal effects of the multinomial logistic regression (N = 925).

	Class 1		Class 2		Class 3		Class 4	
	Non-users		Users for mainly standard work		Users for mainly non-standard work		Users for standard and non-standard work	
Age-based HR policies								
Demotion	-0.12		0.08	*	0.03		0.00	
Offering training to older workers	-0.02		-0.00		0.02		0.00	
Offering early retirement	-0.15	**	0.06	*	0.04		0.04	
Allowing flexible working hours	-0.05		0.06	*	0.01		-0.02	
Organizational characteristics								
Sector (ref. = Industry and construction)								
Services and trade	0.00		0.03		-0.05	*	0.02	
(Semi-)Public sector	0.00		0.02		0.00		-0.03	
Other	-0.08		0.10		0.02		-0.03	
Size (ref. = 2–25 employees)								
26–75 employees	-0.18	**	0.11	**	0.01		0.06	
76–200 employees	-0.21	**	0.13	**	-0.01		0.09	*
> 200 employees	-0.23	**	0.12	**	0.01		0.10	**
Workforce characteristics								
Percentage of older workers (aged 50+)	-0.002		0.002	*	-0.001		0.001	
Percentage of highly educated workers	0.000		0.001	*	-0.000		-0.001	
Percentage with fixed-term contracts	-0.001		0.001		-0.000		-0.000	
Percentage with part-time contracts	0.001		0.000		-0.000		-0.001	
Difficulty finding employees (ref. = never)								
For some positions	0.11	*	-0.05		-0.01		-0.06	
For relatively many positions	0.12	*	-0.04		-0.01		-0.06	
Log likelihood					-1029.11			
$\chi^2(48)$					154.01**			
Pseudo R^2					0.07			

Note: * $p < 0.05$; ** $p < 0.01$

early retirees), but may also try to retain the valuable skills of older workers through early retirement and subsequent bridge employment. Finally, organizations that allow flexible working hours are also more likely to be classified as users for mainly standard work. There is no significant effect for the remaining three classes. Note that the effect sizes of demotion, offering early retirement, and allowing flexible working hours are approximately similar for the users for mainly standard work class. Also, note that the relatively small size of the users for mainly non-

standard work class (<100 organizations) may have obscured possible significant effects of the age-based HR policies.

Of the control variables, organizational size is most strongly related to the employment of early retirees. The larger an organization, the more likely it is to fall in the users for standard work or the users for standard and non-standard work classes. Small organizations (with up to 25 employees), on the other hand, are less likely to employ early retirees. Notice the comparatively large effect sizes: organizational size appears to be a key driver for the way of employing early retirees. Note, however, that there is no significant effect of organizational size for users for mainly non-standard work. With respect to sector, organizations in the services and trade sector are relatively less likely to fall in the users for mainly non-standard work class. Further, organizations that have more older and more highly educated workers are more likely to fall in the users for mainly standard work class, although the effects are relatively small. Finally, and somewhat surprisingly, organizations that have faced difficulties finding suitable employees are substantially less likely to employ early retirees. This finding suggests that when organizations struggle to find qualified workers, they do not turn to early retirees to fill the void.

Discussion

In the present study we have classified organizations based on their way of employing early retirees, and examined how this is related to the application of four age-based HR policies. A key strength of this study is that we considered organizations' practices on three dimensions: frequency of employment of early retirees, the types of work early retirees are deployed for, and whether or not early retirees are paid.

The results show that organizations can be empirically divided into four classes with regard to their employment of early retirees: 'non-users', 'users for mainly standard work', 'users for mainly non-standard work', and 'users for standard and non-standard work'. A notable finding is that almost all organizations that employ but do not pay their early retirees (approximately one in seven of those that employ early retirees) fall in the users for mainly non-standard work class.

Our follow-up multinomial logistic regression analysis showed that organizations that apply demotion, offer early retirement, and offer flexible working arrangements to their permanent staff are more likely to be classified as users for mainly standard work. This finding implies that organizations with broad scopes of age-based HR policies are more open to employing early retirees for regular work tasks. For these organizations, employing early retirees may be a way to retain the valuable skills offered by older workers on a part-time basis. The effect of demotion for this population of workers is especially interesting. Although demotion is often seen as

detrimental to motivation and productivity (e.g., Josten & Schalk, 2010), firms that practice it in an appropriate way may be better able to balance the costs of older workers with their productivity levels and therefore better able to retain their older workers, even after (early) retirement.

Moreover, offering early retirement was found to be negatively associated with not employing early retirees. This finding suggests that organizations that offer attractive early retirement schemes do not do so exclusively to remove older workers from the labor force (i.e., they are not opposed to employing early retirees), but rather use such schemes to retain the valuable skills of older workers through early retirement and subsequent bridge employment. That said, not all these organizations are necessarily willing to re-hire all their older workers who have taken early retirement. As other studies have shown (e.g., Hutchens & Grace-Martin, 2006; Vickerstaff et al., 2003), many firms offer bridge jobs informally to specific, valuable employees, but have no formal policies on providing bridge employment opportunities to all (early) retirees.

Furthermore, organizational size was found to be most strongly related to organizations' way of employing early retirees in the present study. Organizations with more than 25 employees were more likely to be users for mainly standard work and users for standard and non-standard work (but not users for mainly non-standard work), whereas small organizations with up to 25 employees were more likely to be non-users. A sufficiently large organizational size seems to be a prerequisite for efficient employment of early retirees. Presumably, larger organizations have better opportunity structures for incorporating the specific characteristics and workload preferences of early retirees, whereas smaller organizations have less flexibility to incorporate such workers. Also, surprisingly, organizations that have a difficult time finding suitable workers were unlikely to employ early retirees, indicating that early retirees are generally not thought of as suitable employees in difficult times.

The present study has a number of limitations. Firstly, we used rather crude measures for organizations' employment of early retirees. Future studies could, for example, allow organizations to differentiate their answers when they employ early retirees for different purposes. Secondly, we only studied the employment of early retirees in the Netherlands. Hence, the specifics of the Dutch context, such as the country's almost full coverage of occupational pension systems and a minimum wage law, could have influenced our results. It would be interesting to see whether organizations in other countries differ in their employment practices with regard to early retirees. Thirdly, we have analyzed a cross-sectional effect of HR policies and organizational characteristics on organizations' ways of employing early retirees. In reality, however, hiring early retirees and implementing HR policies will be more of a continuous

process, influenced by many complex factors such as a desired workforce mix, laws, and stimulation policies. For example, a positive experience with employing early retirees in response to a governmental stimulation program may lead to a higher desired share of early retirees, which may in turn lead to the implementation of age-based HR policies to retain older workers and attract more early retirees.

Future research could therefore build on these results by using more specific measures and multinational and longitudinal panel data. Specific care should be taken to disentangle causal effects of HR policies and employment practices, for example by estimating a simultaneous equations model. Also, more aged-based HR policies could be included and a larger sample surveyed to investigate what drives users for mainly non-standard work and users for standard and non-standard work. Furthermore, future studies could try to extend on our finding that a considerable amount of organizations in our sample employ but do not pay their early retirees, a form of unwaged labor that is hardly recognized in the traditional conceptualization of work (R.F. Taylor, 2004). Our results show that unwaged early retirees are mainly used for non-standard work, but it would be interesting to see what motives drive individuals and organizations toward this employment arrangement.

This paper makes a novel contribution to the body of knowledge on bridge employment. It is among the first studies to investigate organizational practices with regard to the employment of early retirees. We showed that this employment mode is relatively common in the Netherlands, but that a number of different approaches to employing early retirees can be distinguished. Our multi-dimensional approach proved valuable in its clarification that organizations that employ early retirees mainly differed in the type of work such employees are deployed for. The application of the age-based HR policies of demotion, offering early retirement, and allowing flexible working hours was found to be related to organizations deploying early retirees for standard work. Broader implementation of these policies may provide older workers with opportunities to extend their careers in a satisfactory way and make a more gradual transition from a working life to a life in retirement.

Chapter 3

How likely are employers to rehire older workers after mandatory retirement?

A vignette study among managers

Jaap Oude Mulders, Hendrik P. van Dalen, Kène Henkens, & Joop Schippers

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Abstract

With a vignette experiment among Dutch managers we examine employers' considerations in the decision to rehire employees after mandatory retirement. We specifically focus on the effects of the employee's downward wage flexibility (i.e., the willingness to accept a lower wage) and contract flexibility (i.e., preference for a contract which allows flexible hours or employment). The results show that employers are strongly affected by employees who offer to work for a significant lower wage, but not by the employees' preference for a particular labor contract. Employers are overall quite disinclined to rehire employees after mandatory retirement, although large differences exist between employees. Part of these differences can be explained by managers having higher retirement age norms (i.e., the maximum age at which employers consider employees suited for work in their organization).

Introduction

Under pressure of population aging retirement policies and practices have changed in many OECD countries since the 1990s. Opportunities for early retirement under favorable conditions have largely been abolished, there is a trend towards working longer, and the prevalence of ‘bridge employment’ and post-retirement employment has risen sharply (OECD, 2006; Pleau & Shauman, 2012; Cahill et al., 2013). The growth in labor force participation of older workers is mainly due to increased participation of workers between the ages of 50 and 65. Though employment after the age of 65 is also increasingly prevalent, it is still relatively rare, especially in European countries where mandatory retirement is a common practice (OECD, 2006; 2014). One of the main difficulties for older workers is regaining a position on the labor market once they have been dismissed or, as is the case in the present study, mandatory retirement ends their formal employment relation. While an increasing proportion of workers would like to continue working after mandatory retirement age and hence retire gradually from the labor market (Kantarci & Van Soest, 2008), their reemployment after mandatory retirement is ultimately in the hands of employers. In this paper, we study which factors affect employers’¹ decisions to rehire employees who want to continue working past the mandatory retirement age.

Theoretically, mandatory retirement is a necessary part of a long-term implicit contract in which earnings grow more rapidly than productivity over the life cycle (Lazear, 1979; De Hek & Van Vuuren, 2011). Young workers are de facto paid less than their worth, while older workers are paid more. This arrangement increases the costs of shirking and hence keeps the worker motivated throughout the contract period. Ending the employment contract at a collectively determined fixed age is necessary to prevent workers from ‘overearning’ indefinitely. Although the implicit contract cannot be observed directly, a range of evidence for the US economy compiled by Hallock (2009) suggests that this type of contract is subject to erosion but certainly has not disappeared. In the case of the Netherlands, older workers in particular still enjoy the benefits of the so-called implicit contract in terms of seniority based wage growth, tenure and employment protection (cf. Conen et al. 2012a). These elements together with mandatory retirement have been institutionalized in collective labor agreements and organizations’ human resource policies.

The position of the older worker depends crucially on how employers assess and perceive the productive value and the price of their labor services. From earlier research we know that many employers have stereotypical views about older workers being less productive than their younger colleagues (Posthuma & Campion, 2009; Van Dalen et al., 2010b; Conen et al., 2012a).

¹ We refer to the participants of our study as ‘employers’, although they are mainly line managers who have the authority to make employment decisions.

These negative stereotypes seem to be reflected in employers' behavior and policies to stimulate and accommodate an extension of the working life. For example, Conen et al. (2012b) show that only 13% of European employers would consider asking their employees to work past the age of 65 should they be confronted with a shortage of personnel. Other studies show that employers are reluctant to formalize policies regarding bridge employment. They rather offer these opportunities informally to specifically valuable employees who are approaching retirement or to those who indicate their desire for bridge employment (Vickerstaff et al., 2003; Hutchens & Grace-Martin, 2006). Retirees from outside the organization are even less likely to be considered for employment, as their characteristics and skills are often hard to assess for an employer (Hutchens, 2007).

Earlier studies examining the decision making process of employers regarding the employment of (early) retirees show that employers strongly consider the employability of the applicant, in terms of health and experience with the job (e.g., Karpinska et al., 2011; 2013a). However, these studies do not distinguish between the (re)employment of insiders (i.e., former employees) and outsiders (i.e., retirees not previously connected to the firm), and do not specifically consider reemployment after mandatory retirement. Also, an important missing component in these studies is the flexibility of the employee: the willingness to accept a lower wage and to work in a flexible employment arrangement. Downward wage flexibility may crucially affect employers' decisions in this matter as the demand for older workers is strongly related to labor costs (Conen et al., 2012a; Hutchens, 1986). Furthermore it may also be the case that employers value contract flexibility highly as this type of flexibility is particularly relevant for bridge jobs – jobs covering the period between career employment and exit from the labor force (Shultz, 2001). In understanding reemployment of older workers, we therefore focus specifically on the effects of downward wage flexibility and contract flexibility² on employers' decisions. We study the reemployment decision in a vignette experiment among Dutch employers. This method combines experimental and survey principles to elicit preference structures or evaluations (Rossi & Anderson, 1982; Van Beek et al., 1997; Wallander, 2009).

With this study we contribute to the literature on the demand for older workers and employment after retirement in three main ways. First, we focus on the demand for employees who have reached the mandatory retirement age. Continued employment with the same employer into old age is considered an appropriate way to increase the labor participation of seniors and extend their working lives (OECD, 2006), which raises questions about the appropriateness of mandatory retirement and the way it may impede employment past mandatory retirement age.

² We define 'downward wage flexibility' as the willingness to accept a lower wage; we define 'contract flexibility' as a preference for a more flexible employment contract.

Second, our focus specifically lies with the effects of employee flexibility on employers' decisions. When mandatory retirement approaches, many factors that might influence the chance of reemployment are not or no longer under direct control of an employee. For example, older workers are unlikely to be considered for training to update their firm-specific human capital (Martin et al., 2014), and may have health problems which limit their employability. However, there are factors that *are* under the employee's control, such as downward wage flexibility and contract flexibility, and these factors may also affect their chances of reemployment. These factors have been largely ignored in previous research.

Third, we consider employers' retirement age norms concerning the employability of older workers as brought on by previous experience with older workers and personal beliefs (Settersten & Hagestad, 1996). These norms may deviate from the institutionalized retirement age norm that is set by the mandatory retirement age, and may help explain some of the large differences found in employers' behavior towards retirees (Karpinska et al., 2011).

The current study took place in the Netherlands. Here, mandatory retirement is very common, with about 92% of the permanent labor contracts ending at state pension age (which is being gradually raised from 65 to reach 67 in 2021; OECD, 2014). With the increase in population aging the Dutch government is trying to facilitate post-retirement employment, as most labor contract laws and collective labor agreements do not currently apply to employees over the age of 65. The government is working on legislation that proposes applying the minimum wage for people over the state pension age, as well as increasing the options for flexible employment and shortening employers' obligation for paid sick leave from two years to six weeks (OECD, 2014).

The remainder of this paper is organized as follows. Section 2 presents the theoretical background on employers' decision making in the context of reemployment after mandatory retirement. Section 3 introduces the data and methods used to test our hypotheses. Section 4 presents the results. Section 5 concludes the paper.

Theoretical background

Whenever an employee indicates a desire to continue working past the mandatory retirement age, an employer is likely to weigh the pros and cons of continued employment. Since mandatory retirement formally ends the labor contract, the terms of a potential new contract are in principle open for (re)negotiation. Various factors come into play. To structure our analysis of factors that may influence employers' decisions, we distinguish between factors that pertain to the employee

who wants to continue working and factors that pertain to the organizational context and the individual employer making the actual reemployment decision.

Employee-level factors

First, we consider how employers' decisions to rehire employees after mandatory retirement are affected by the flexibility of these employees, in terms of downward wage flexibility, and contract flexibility (i.e., a preference for a certain type of employment contract). Mandatory retirement is the necessary termination point in an implicit contract, according to which employees are 'underpaid' relative to their productivity at younger ages, but 'overpaid' relative to their productivity at older ages (Lazear, 1979). Such a deferred compensation scheme discourages shirking behavior, and is beneficial to both employers and employees in the long run (Lazear, 1979; Gomez et al., 2002). However, in the case of reemployment after mandatory retirement, long-term employment is most likely considered to be unfeasible, and employers are expected to want the new wage to more accurately reflect the employee's level of productivity. We therefore expect employers to be more likely to rehire employees who indicate a willingness to accept a lower wage to continue working after retirement.

With regard to contract flexibility, employers' preferences are not so straightforward. Standard full-time employment is by many employers considered most practical with regard to scheduling jobs and workload (Siegenthaler & Brenner, 2001). However, nonstandard employment arrangements, such as part-time or on-call employment, may also have advantages (Kalleberg, 2000), and are frequently used for the employment of (early) retirees (Oude Mulders et al., 2015). Common reasons why employers have staff on part-time or on-call contracts are to have them temporarily fill in for absent regular staff or to accommodate fluctuations in workload (Houseman, 2001). In addition, a more flexible work arrangement in combination with a lower workload may help maintain the productivity of an older worker (Skirbekk, 2008) and thus contribute to a longer period of employment after mandatory retirement. On-call contracts have the distinct advantage that they allow employers to keep their budget in check as no costs are made when no work is done. Based on this, we expect employers to be more likely to rehire those with a preference for on-call employment over those with a preference for either part-time or full-time employment. We expect no difference between the latter two.

Next to the flexibility of employees, we include a number of other employee-level factors that are expected to affect employers' decisions. These are mainly related to the concept of employability, which Fugate et al. (2004, p.16) define as "a form of work specific active adaptability that enables workers to identify and realize career opportunities." In the current

study, we consider knowledge and experience of the employee, his or her level of performance until retirement, health, and social contacts. When employees possess unique knowledge and experience, and have functioned satisfactorily until retirement, a higher productivity can be expected after potential reemployment, making them more attractive to employers. Likewise, employees in good health can be expected to be less risky compared to employees with weaker health status. Employees with many valuable social contacts for the organization can help employers profit from these contacts, while lacking those contacts makes an employee less valuable. All these factors are expected to contribute positively to employers' likelihood of rehiring employees after mandatory retirement.

Finally, on the employee-level we consider the effect of the employee's main motivation to continue working. We distinguish between the employee mainly working for financial reasons; to retain the social contacts at work; to have a feeling of personal satisfaction from work; and to transfer knowledge to younger colleagues (Mor-Barak, 1995). These categories reflect motives that are commonly found in empirical work (e.g., Dingemans & Henkens, 2014; Lynch, 2012; McEvoy & Henderson, 2012). The perceived motivation of the employee to continue working may influence the employer's decision through a perceived fit or misfit with personal or organizational values.

Employer-level factors

The decision to rehire employees after mandatory retirement is embedded in a broader organizational context and is taken by an individual with certain beliefs about the skills and qualities of employees working past a certain age. These employer-level factors may affect the likelihood of reemployment after mandatory retirement for older workers. First, we consider the labor market context of the organization. A considerable level of employment protection commonly accompanies mandatory retirement policies and seniority wages (Gomez et al., 2002), which makes older workers with long organizational tenure particularly costly to dismiss. When employers need to downsize their workforce due to a recession, mandatory retirement may be welcomed as there are no costs involved, and rehiring mandatorily retired employees is not expected to be a priority (Van Dalen & Henkens, 2013). In contrast, when an organization operates in a tight labor market, employers are expected to be more likely to offer reemployment to employees approaching mandatory retirement.

Second, we consider how employers may differ in their likelihood to rehire employees as a result of their *retirement age norms*. Individual employers may differ in their attitudes and behavior towards older workers because of their own experiences with older workers in their organization,

the observed attitudes and behaviors of similar others, or because of their own personal values about the appropriateness and desirability of people working past a certain age (Settersten & Hagestad, 1996). These norms may deviate from the institutionalized retirement age norm that is set by the mandatory retirement age (often 65). We expect managers with higher retirement age norms (i.e., who consider employees to be suited for work up to a higher age) to be more likely to rehire employees after mandatory retirement.

Design and Methods

Data

In 2013, we gathered data on employers' hiring behavior towards former employees through the Longitudinal Internet Studies for the Social sciences (LISS) panel of CentERdata, Tilburg University. The LISS panel consists of a representative sample of Dutch inhabitants who participate in monthly internet surveys on a variety of topics. For the current study we selected individuals who had reported to be in a management position. 864 individuals were approached for participation in the survey, of which 698 responded, yielding a response rate of 81%. To ensure we only analyzed data from line managers who were involved in selection and recruitment of employees, we asked the selection questions '*Do you occupy a management position within your organization?*' and '*In the last ten years, have you had to take decisions regarding recruitment and selection of employees?*'. Respondents who were not managers anymore ($n = 45$) or who did not deal with recruitment and selection ($n = 98$) were dropped from further analysis, as well as respondents who had retired or gotten unemployed since the panel first started ($n = 46$), and respondents who worked as freelancers ($n = 66$), leaving us with 443 respondents. Table 3.1 presents descriptive information of the final sample.

Measures

We collected data with a vignette study (also known as a factorial survey); a method that combines survey questions with experimental methods, and is considered specifically suitable to uncover the underlying structure of human judgments in social contexts (Rossi & Anderson, 1982; Wallander, 2009). The data collection was split up into two periods to limit the risk of so-called 'carryover effects': when context items are asked prior to the target items in a survey, the context items may increase the accessibility of material in the mind, which is then carried over and used in answering the target items (cf. Tourangeau et al. 1989).

Table 3.1. Descriptive statistics of employers' characteristics (N = 443).

Variable	Categories	M or %	SD
Gender	Male	66.8%	
	Female	33.2%	
Age		47.52	10.01
Retirement age norm		65.73	5.84
Sector	Industry and construction	19.0%	
	Services and trade	27.8%	
	(Semi)public sector	27.3%	
	Other	26.0%	
Level of subordinates	Low	23.5%	
	Medium	41.3%	
	High	35.2%	
Percentage of older workers		33.97	18.95

First, in March 2013 participants were asked to answer several questions related to their organizations' policies and practices towards older workers and retirees, and their individual attitudes and behavior regarding the employment of older workers. For this study, we consider the *employer's retirement age norm*, which was measured with the question 'At what age do you consider a person too old to work in your organization for 20 hours a week or more?' The answers were truncated between 50 and 80³. The following background information on the employer and the organization was gathered: *employer's gender* (0 = Male; 1 = Female); *employer's age*; *organization's sector* (15 answering categories that were divided into three main sectors (industry; services and trade; (semi)public sector) and one 'other' category); the most common educational level in the organization was dubbed the *level of subordinates* (low; medium; high); and *the organization's percentage of older workers* (defined as workers aged 50+; measured in categories: 0-10%; 10-20%; etc.).

In the second part of data collection, in May 2013, the participants were randomly assigned to one of three experimental conditions related to the contract form, and were asked to evaluate five vignettes. The vignettes contained descriptions of employees at the age of 65 who wanted to continue working in either a full-time, part-time, or on-call employment capacity, depending on the experimental condition⁴. Seven characteristics describing the employee were included in the vignettes. Their possible values are presented in Table 3.2. The values of these characteristics

³ We truncated *retirement age norm* to avoid problems with outliers. This did not substantively alter our results.

⁴ By design, participants were shown five descriptions of employees who all wanted to continue in either a full-time, part-time, or on-call employment arrangement. The employment arrangement is mentioned in the vignette description, as well as in the question that serves as the dependent variable (see also Figure 3.1).

were randomized between vignettes. Each combination of characteristics is thus equally likely, which allows us to reliably estimate the effects of each independent variable. For the *dependent variable*, respondents answered the question ‘What is the likelihood that you would rehire this employee on a(n) full-time/part-time/on-call contract?’, with the contract depending on the experimental condition. Answers ranged from 1 (very unlikely) to 11 (very likely). An example of a vignette is shown in Figure 3.1.

Table 3.2. Characteristics included in the vignettes, and their possible values.

Vignette characteristic	Possible values
Organizational context	Need to downsize No recruitment problems Recruitment problems
Downward wage flexibility	Not willing to reduce wages Willing to accept a 20% wage reduction Willing to accept a 40% wage reduction
Knowledge and experience	Easy to replace Hard to replace
Performance until retirement	Not so good Good
Health	Not so healthy In good health
Social network	Few valuable contacts for the organization Many valuable contacts for the organization
Motivation to continue working	For financial reasons To retain social contacts at work Personal satisfaction of working To transfer knowledge

Analysis

The data have a multilevel structure, with 2,215 vignette observations nested within 443 employers. Because multiple observations from the same respondent are not independent, standard regression analysis is very likely to result in erroneous statistical estimations. We therefore perform multilevel regression analysis to account for variance on both levels (Snijders & Bosker, 1999). In the current study, the intra-class correlation of the empty multilevel model (i.e., with no explanatory variables) is 0.43. This can be interpreted as the proportion of variance that is accounted for by the employer level, or the correlation between values of two random vignettes in the same random employer (Snijders & Bosker, 1999, p. 17). The relatively high value of the intra-class correlation tells us that the nested structure is of large influence on the dependent variable, and multilevel analysis is required to obtain accurate results. Multilevel

Figure 3.1. Example of a vignette.

The following employee has reached the mandatory retirement age of 65 within your organization. He or she would like to continue working on a *part-time basis (two days per week)*. Please indicate, for each employee, the likelihood that you would rehire this person in a *part-time employment arrangement*.

Organizational context	
Organizational context	Recruitment problems
Employee	
Downward wage flexibility	Willing to accept a 20% wage reduction
Knowledge and experience	Hard to replace
Performance until retirement	Good
Health	Not so healthy
Social network	Few valuable contacts
Main motivation to continue working	To retain social contacts at work

What is the likelihood that you would rehire this employee in a *part-time employment arrangement*?

1	2	3	4	5	6	7	8	9	10	11
Very unlikely					Neutral		Very likely			

regression analysis implies that the intercept value and the strength of the predictor variables may vary between respondents. This is tested with so-called random intercept and random slope terms. In the current study, these terms are not of prime importance, but are only included to optimize the model and therefore not reported⁵. The reported results are the unstandardized regression coefficients averaged over all respondents⁶.

Results

Table 3.3 presents the results of the multilevel regression analyses in three models. Model I contains only the effects of the vignette characteristics; Model II also contains the employers' characteristics from the survey⁷; Model III additionally contains several interaction effects between vignette-level variables⁸. Note that reference categories were set so that the reference employee is one with no downward wage flexibility, a preference for a full-time contract, low

⁵ Random slopes were considered for all vignette variables. Only those that significantly improved the model were included in the final models (Snijders & Bosker, 1999).

⁶ The coefficients should thus be interpreted in terms of likelihood of rehiring, considering the dependent variable is measured on a scale from 1 to 11.

⁷ Model II is not a significant improvement over Model I ($\chi^2(9) = 15.63$; p -value = 0.075), but this is mainly due to the variables 'sector' and 'level of subordinates' taking degrees of freedom while not explaining much variance.

⁸ Model III is a significant improvement over Model II ($\chi^2(4) = 18.52$; p -value = 0.001).

employability, wanting to continue working for financial reasons, in an organization that needs to downsize. As a result, all effects of the vignette-level variables are in the positive direction and are directly comparable. The age and retirement age norm of employers have been centered, so that the reference employer is 47.5 years old and holds a retirement age norm of 65.7 years.

First, we observe that all vignette characteristics, except contract flexibility, affect employers' decisions. As expected, employers are more likely to rehire employees after mandatory retirement who display downward wage flexibility, have valuable knowledge and experience, have performed satisfactory until retirement, are relatively healthy, have many valuable social contacts, and when the organization faces recruitment problems. These results are highly robust across models.

In line with our hypothesis, employers are more likely to rehire employees who would accept a 20% or 40% wage reduction than employees who would not accept a lower wage. However, the difference between employees accepting a 20% and a 40% wage reduction is not statistically significant. This suggests that employers attach value to employees making a substantial financial sacrifice to stay employed, but that the exact amount is of lesser importance. The effect size of an employee accepting a 40% wage reduction is approximately equally large as the employee having valuable knowledge and experience that is hard to replace, and the employee being in good health. Employers also consider the employee's main motivation in their reemployment decision: they are more likely to rehire employees who are intrinsically motivated (personal satisfaction, transferring knowledge) than employees who mainly work to retain the social contacts at work or for financial reasons. However, we should note that the effects are relatively small compared to the other employability effects. Contrary to our expectations, contract flexibility does not affect employers' likelihood of rehiring employees after age 65: they are equally likely to rehire employees with a preference for full-time, part-time, or on-call employment. This suggests that employers base their reemployment decisions on other factors, and keep an open mind in accommodating the contract preferences of older workers.

The effects of the employer characteristics in Model II show that – as expected – employers who hold higher retirement age norms are more likely to rehire employees after mandatory retirement in their own organization. There is no significant difference between male and female employers. However, we do observe that older employers are slightly less likely to rehire employees after mandatory retirement than younger employers. This is in marked contrast to the results found by Heyma et al. (2014), who find that older Dutch managers are more likely than younger managers to hire older job seekers. However, they limit their attention to job seekers below the age of 65, which may indicate a distinction in the minds of managers and employers between older job seekers and retirees looking for a bridge job. We find no significant effects of

Table 3.3. Multilevel regression results of the likelihood of rehiring employees after mandatory retirement.

	Model I	Model II	Model III
	Coefficient	Coefficient	Coefficient
	S.E.	S.E.	S.E.
Employee-level factors			
Downward wage flexibility (ref = None)	0.57 ***	0.56 ***	0.73 ***
	0.09	0.09	0.13
20% reduction	0.69 ***	0.69 ***	0.86 ***
	0.10	0.10	0.13
40% reduction	-0.02	-0.01	-0.01
Part-time	0.24	0.25	0.26
On-call	0.69 ***	0.69 ***	0.93 ***
	0.08	0.08	0.13
Knowledge and experience (ref = Easy to replace)	1.40 ***	1.40 ***	1.02 ***
	0.09	0.09	0.14
Performance until retirement (ref = Not so good)	0.70 ***	0.69 ***	0.70 ***
	0.08	0.08	0.08
In good health	0.48 ***	0.48 ***	0.47 ***
Many valuable contacts	0.03	0.04	0.03
Retain social contacts	0.33 **	0.33 **	0.33 **
	0.11	0.11	0.11
Personal satisfaction	0.30 **	0.30 **	0.30 **
	0.11	0.11	0.11
Transfer knowledge			
Employer-level factors			
Organizational context (ref = Need to downsize)	0.46 ***	0.46 ***	0.22 †
	0.09	0.09	0.13
No recruitment problems	1.09 ***	1.09 ***	0.76 ***
	0.09	0.09	0.13
Recruitment problems	0.04 *	0.04 *	0.04 *
	0.02	0.02	0.02
Female	-0.10	-0.10	-0.09
	0.20	0.20	0.20
Services and trade	-0.02 *	-0.02 *	-0.02 *
	0.01	0.01	0.01
(Semi)Public	0.02	0.02	0.01
	0.27	0.27	0.27
Other	-0.28	-0.28	-0.29
	0.28	0.28	0.28
Medium	-0.20	-0.20	-0.19
	0.27	0.27	0.27
High	0.06	0.06	0.07
	0.24	0.24	0.24
Level of subordinates (ref = Low)	-0.13	-0.13	-0.11
	0.25	0.25	0.25
Percentage of older workers (aged 50+; ref = 0-10%)	-0.04	-0.04	-0.04
	0.05	0.05	0.05

Interaction effects					
Hard to replace knowledge and experience + 20% wage reduction				-0.36 †	0.18
Hard to replace knowledge and experience + 40% wage reduction				-0.38 *	0.19
Good performance + no recruitment problems context				0.49 **	0.19
Good performance + recruitment problems context				0.65 ***	0.18
Constant	1.58 ***	0.19	1.98 ***	0.40	2.05 ***
Employer-level variance	2.37	0.24	2.27	0.24	2.27
Employee-level variance	2.02	0.11	2.04	0.11	2.00
Log-likelihood	-4681.33		-4673.52		-4664.26
Number of vignettes (respondents)	2215	(443)	2215	(443)	2215

† $p < 0.1$; * $p < 0.05$; ** $p < 0.01$; *** $p < 0.001$

Note: All models have significant random slopes for wage flexibility, knowledge, performance, health, and social network, which means that these effects differ significantly between respondents (e.g., Snijders & Bosker, 1999). The random slopes are not reported, but are available on request.

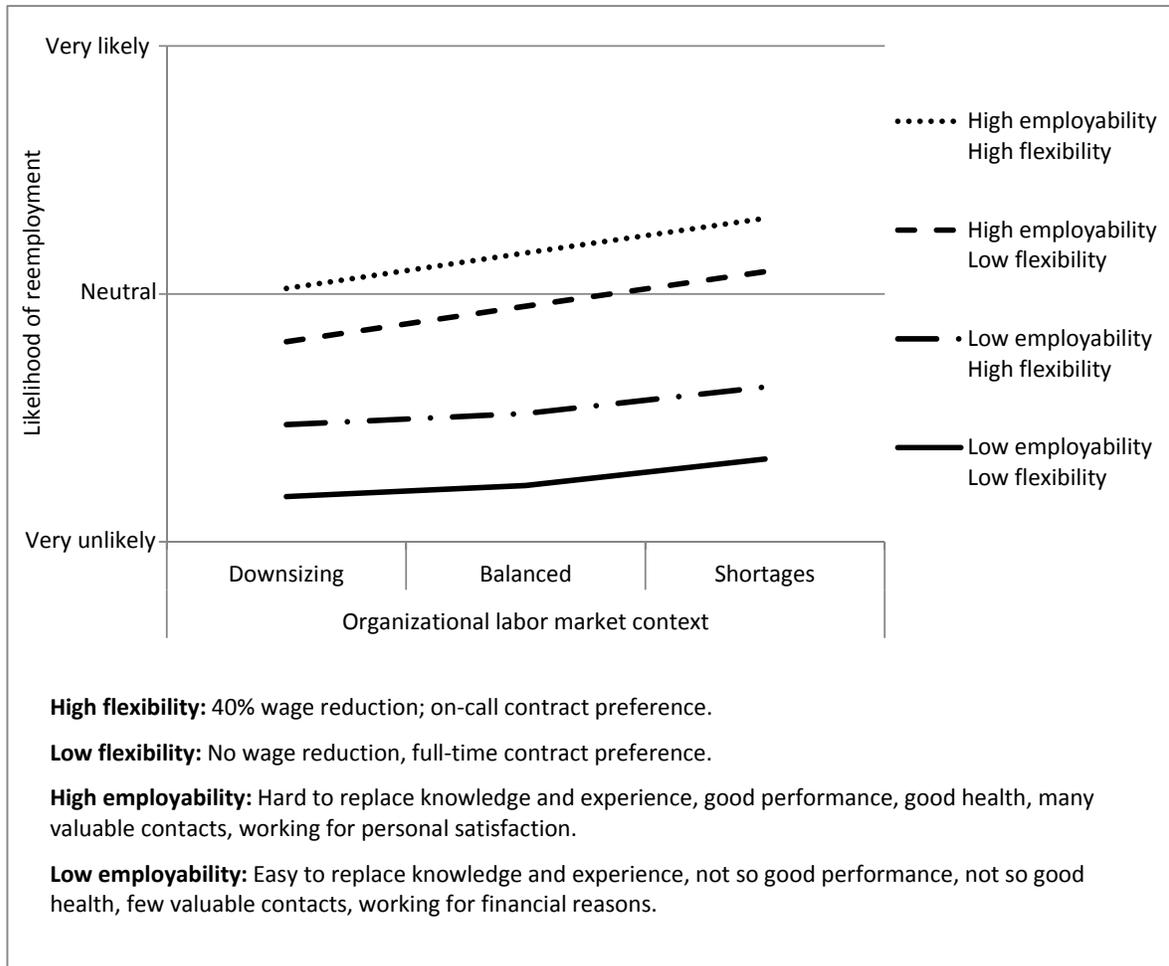
the employing organization's sector, the most common level of subordinates, and the percentage of older workers in the organization.

Finally, we tested several interaction terms to examine whether the effects of downward wage flexibility and contract flexibility differed for employees with different characteristics, and whether the importance of the employability effects was related to the organizational labor market context. Only the significant interaction effects are presented in Model III of Table 3.3. We observe an interaction effect of the employee having 'hard to replace knowledge and experience' and accepting a lower wage offer. Both main effects increase in size, but a significant negative interaction effect appears, suggesting that employers are not as strongly influenced by the downward wage flexibility of an employee when he or she possesses knowledge and experience that is hard to replace. In other words, the need for downward wage flexibility to get reemployed is smaller for employees who have unique knowledge or experience, although downward wage flexibility still increases their chances for reemployment. Also, we observe an interaction effect of the employee's performance and the organizational labor market context. The interaction effect is significant and positive, while both main effects are slightly weakened, suggesting that well performing employees are especially likely to get reemployed when there is no need for downsizing.

Figure 3.2 offers a graphic representation of the interaction effects and the likelihood of employers to rehire different types of employees. It shows predicted values of regression Model III of Table 3.3 for four stylized types of employees in different organizational contexts. That is, predicted values were calculated for employees with high employability (hard to replace knowledge and experience, good performance until retirement, good health, many valuable contacts for the organization, working for personal satisfaction) and high flexibility (40% wage reduction, on-call contract preference); high employability and low flexibility (no wage reduction, full-time contract preference); low employability (easy to replace knowledge and experience, not so good performance, not so good health, few valuable contacts for the organization, working for financial reasons) and high flexibility; and low employability and low flexibility. The figure shows that employers are very unlikely to rehire employees with low levels of employability, regardless of their flexibility and the organizational labor market context. However, the overall scores for the reemployment of employees with a high level of employability are also relatively low, hovering around the neutral mark. This suggests that even highly employable employees may need to accept a significant wage reduction to get their employer to consider them for continued employment after mandatory retirement. Overall, it seems that employers are

quite unwilling to rehire employees after mandatory retirement, except when they are highly employable, highly flexible, and the organization faces recruitment problems.

Figure 3.2. Illustration of interaction effects.



Conclusion and discussion

Which factors influence employers' decisions to rehire employees after mandatory retirement? The current study has tried to answer this question with data from a vignette study among Dutch employers. A key strength of this study is its specific contextual focus – reemployment of employees after mandatory retirement – and its consideration of effects of employee downward wage flexibility and contract flexibility on employers' reemployment decisions.

The first main finding is that downward wage flexibility significantly affects employers' reemployment decisions in the context of mandatory retirement. Employers are considerably more likely to rehire employees who are prepared to accept a significantly lower wage after

mandatory retirement. From a theoretical perspective, this was predicted because mandatory retirement marks the end of the implicit contract in which wages and productivity are balanced over the life cycle (Lazear, 1979), and employers probably want the post-retirement wage to be more in line with workers' productivity. Note that this does not necessarily imply that the older worker has become less productive. It merely suggests that the seniority principle of an upward sloping wage profile is not tenable and the wage level should be reconsidered once the mandatory retirement age has been reached. In contrast, employers are not more likely to rehire employees who have flexible contract preferences, such as part-time or on-call employment compared to an employee with a fulltime contract. This suggests that employers make their reemployment decision irrespective of the preferred employment contract of the employee. Employers may perhaps be willing to accommodate the contract preferences of their older workers, as this may contribute to their work satisfaction and productivity, and as a form of reward for long organizational tenure (cf. Houseman, 2001). If so, this may help explain part of the large diversity that exists in the way organizations deal with retirement issues and the employment of older workers and retirees (Oude Mulders et al., 2015).

The second main finding is that employers are overall quite disinclined to rehire employees after mandatory retirement, although large differences exist between employers, evidenced by the relatively low scores on the dependent variable. A high level of employability of the employee and a tight labor market context seem like necessary but not always sufficient conditions for reemployment. Employees with a low level of employability are usually not considered for reemployment, regardless of their flexibility, and organizations that need to downsize have other priorities than reemploying employees after mandatory retirement. Still, there are employers who have a more positive view on employees who want to continue working after mandatory retirement. Part of this can be explained by employers having higher retirement age norms – norms considering employees to be suited for work in old age – which has proven itself to also influence employers' decision making in other contexts (Karpinska et al., 2013a; 2013b). Conversely, there are also employers that may not want to rehire employees after mandatory retirement in any circumstance.

This study has some limitations. First, an inherent limitation in vignette studies is that respondents estimate their response to hypothetical cases, which may not always translate into actual behavior (Pager & Quillian, 2005). It is therefore important to study how employers in practice deal with employees who seek reemployment after mandatory retirement, and whether they are affected by the flexibility of the employee.

Second, we only studied the intended behavior of Dutch employers. In the Netherlands, mandatory retirement is a common feature of labor contracts, with about 92 percent of permanent labor contracts ending at state pension age (OECD, 2014). It would be interesting to see whether employers in countries with different labor market institutions and where mandatory retirement is less common react differently to employees that want to continue working after mandatory retirement age. Also, a comparison with employers' employment and retention behavior in countries that have abolished mandatory retirement (such as Australia, UK and USA) would be valuable.

Third, the organizational context in which these decisions are taken is more complex than we have suggested here. In reality, mandatory retirement can be foreseen by both employer and employee, and it is likely that informal arrangements are made before the actual date of mandatory retirement (Vickerstaff et al., 2003).

From the perspective of the employee seeking work after mandatory retirement, our results imply that employees approaching retirement may attempt to increase their likelihood of reemployment by expressing their willingness to accept a lower wage. However, our results also suggest that older workers may have a hard time finding reemployment with the same employer after mandatory retirement, even if they offer to work for a lower wage. Employees who want to continue working but are not considered highly employable, or are employed in an organization that needs to downsize may need to look for employment elsewhere. For them, mandatory retirement could be a form of involuntary retirement, which could eventually lead to decreased satisfaction with life (Dingemans & Henkens, 2014). However, banning mandatory retirement may not solve this problem, as mandatory retirement is inherently tied to employment protection, seniority wages and occupational and state pension plans (Gomez et al., 2002), which are common features of many European labor markets. Banning mandatory retirement would imply a complete restructuring of labor market institutions.

In conclusion, this study has demonstrated which factors affect employers in rehiring older employees after mandatory retirement. Although the employer has the final say in who to hire and who to let go, it is not all in the hands of employers. This study also suggests that employees who display downward wage flexibility make themselves more attractive to employers. In other words, the price of labor at older ages matters quite a lot and hence looking at both demand and supply forces may indeed help to understand trends in working past the mandatory retirement age.

Chapter 4

Managers' interview invitation decisions about older job applicants:

Human capital, economic conditions, and job demands

Jaap Oude Mulders, Kène Henkens, Yihao Liu, Joop Schippers, & Mo Wang

This chapter has been invited to be revised and resubmitted to an international peer-reviewed journal.

Abstract

Older job applicants are vulnerable to stereotype related bias in the recruitment process. In the current study, we examined how managers' job interview invitation decisions regarding older job applicants are influenced by applicants' human capital-related characteristics, general economic conditions and managers' experiences of changes in job demands. Data were collected with two waves of a vignette experiment, three years apart, among a sample of 211 Dutch managers from various organizations. Multilevel analysis showed that managers were more likely to invite older job applicants who had matching qualifications, were employed at the time of application, and came with recommendations. In addition, managers' propensity to invite older job applicants was higher in better economic conditions. The effects of recommendations were moderated by the general economic conditions and changes in job demands, such that a recommendation from another employer was especially influential in bad economic conditions, while a recommendation from an internal employee was especially influential when job demands had increased. The results emphasize the importance of considering the organizational and economic context in understanding the recruitment of older workers. The findings also suggest that older workers, employers, and policy makers should invest in older workers' human capital to protect their employability.

Introduction

Demographic changes in recent decades, most prominently declining birth rates and increased longevity, have led to changes in the age structure of the workforce, with more older workers (aged 50+) than ever before (Wheaton & Crimmins, 2013). In addition, due to changes in retirement legislation in many countries, older workers cannot afford to retire as early as they had been in the past couple decades, which has resulted in increasing numbers of older workers looking for prolonged employment (D'Addio et al., 2010). However, older workers' opportunities for prolonged employment can be obstructed by their poor labor market position. For example, reemployment after job loss is negatively related to workers' age, especially after the age of 50 (Wanberg et al., 2016), leading to longer unemployment durations among older workers than among younger workers (Chan & Stevens, 2001). This is related to the finding that many organizations employ older workers, but do not hire them (i.e., they hire workers at younger ages and employ them into their 50s and beyond, but rarely hire older workers out of the labor market; Adler & Hilber, 2009; Daniel & Heywood, 2007).

One strand of the literature suggests that the poor labor market position of older workers is the result of age discrimination. Studies have shown that older workers consistently receive more negative evaluations than otherwise equivalent younger workers in different employment contexts, such as internal evaluations (Rosen & Jerdee, 1976; Gordon et al., 1988; Lee & Clemons, 1985) and personnel selection for hiring (Bendick et al., 1999; Lahey, 2008; Ahmed et al., 2012). The main argument is that many employers, recruiters, and managers hold predominantly negative stereotypical views of older workers and older job applicants, such as older workers having a lower willingness and ability to engage in learning and to work with new technologies, and being overall less productive than younger workers (Bal et al., 2011; Ng & Feldman, 2012; Posthuma & Campion, 2009; Van Dalen et al., 2010b), and are therefore more likely to evaluate an older worker or job applicant negatively than a younger worker or job applicant (Büsch et al., 2009; L.M. Finkelstein et al., 1995; Roscigno et al., 2007). However, these studies focus explicitly on age, comparing older workers to younger workers, and thereby largely ignore other factors that may influence older workers' job search outcomes. For example, it is not clear what distinguishes older workers from one another in the eyes of hiring managers. In addition, as Landy (2008) argues, many of these studies lack external validity as a result of their use of student samples and unrealistic evaluation experiments that are not generalizable to real world situations.

Managers' evaluation of job applications and their subsequent decision whether or not to invite a job applicant to an interview is one of the few cases that is comparable in an experimental

setting and in the real world (Landy, 2008). Screening of job applications is one of the main methods of personnel selection that organizations use for virtually all jobs (Cole et al., 2003; Schmidt & Zimmerman, 2004). In addition, it is a phase where job applicants and managers usually have not had any personal interaction, which makes the decision prone to stereotype-related bias (Derous et al., 2015; Landy, 2008). Research on the effects of résumé contents on managers' hiring recommendations suggests that human capital plays an important role: résumé contents such as academic achievement and work experience are related to managers' inferences about the productivity of the job applicant and how well the job applicant may fit the job and the organization (Chen et al., 2011; Cole et al., 2007; Tsai et al., 2011). However, within this literature, little attention has been paid to job applicants who may suffer from stereotypical bias about their productivity, such as older job applicants, and it is therefore unclear to what extent human capital-related factors may influence employment outcomes for such groups. In addition, there is a need for a better understanding of boundary conditions that may alter the relationship between résumé contents and the interview invitation decision of managers (Tsai et al., 2011). In particular, economic and organizational contexts have been suggested to shape the effects of human resource management practices (Jackson & Schuler, 1995; Y. Kim & Ployhart, 2014).

Therefore, the purpose of the current study is to examine managers' interview invitation decision with regard to older job applicants. In particular, taking a human capital perspective, we investigate how managers' interview invitation decision depends on older job applicants' human capital related characteristics. In addition, we test the external economic conditions (before vs. after European debt crisis), and managers' organization-specific experience of changes in job demands as potential moderators on the effects of applicants' human capital-related characteristics. To do so, we analyzed data from two waves of a vignette experiment among Dutch managers from various organizations. The data were collected in 2010 (before the European debt crisis) and 2013 (after the European debt crisis). Between these years, the Dutch economy went through a persistent recession, which was part of the broader Great Recession and the European debt crisis (OECD, 2014). This is evidenced by the increase in the unemployment rate from 5.6% in the second quarter of 2010 to 8.3% in the second quarter of 2013, while economic growth declined from 1.8% to -1.2%, and government debt increased from 59% to 68.5% of the gross domestic product (Statistics Netherlands). The study was repeated in 2013 with the same sample to create a natural experiment that allows us to study the changes in managers' evaluations of older job applicants in a period of economic recession, and contributes to a better understanding of the effects of recessions on human resource related practices (Latham & Braun, 2011).

The current study makes three important contributions to the literature. First, it is among the first to specifically study the effects of older job applicants' human capital-related characteristics on managers' interview invitation decisions, which is empirically relevant in a labor market with a significantly increasing portion of older workers. Second, we rely on the timing of our measurement to create a natural experiment, which allows us to study whether managers' assessment of older job applicants changed under different general economic conditions. This also provides a unique opportunity to study the general economic context as a potential boundary condition of micro-level hiring decision-making among managers. Third, we study whether the change in the organization-specific experience of the manager, specifically the change in job demands, influences the weight that managers attach to different human capital related characteristics in their interview invitation selection decision regarding older job applicants. This way, we recognize the importance of the organizational context in which the manager operates, and advance the understanding of how organizational context may moderate the relationship between older job applicants' human capital-related characteristics and managers' interview invitation decision.

Theoretical Framework and Hypotheses

Older Job Applicants' Human Capital-Related Characteristics and Managers' Interview Invitation Decisions

The screening of job applicants' résumés is often one of the first steps in the personnel selection process (Cole et al., 2003; Schmidt & Zimmerman, 2004). Because interviewing and other selection methods such as testing are costly, résumé evaluation is used as an inexpensive initial screening tool to determine whether job applicants have the characteristics that warrant further evaluation (Cole et al., 2009). The relationship between résumé contents and hiring recommendations has been well established empirically, and has been shown to be mediated by factors such as recruiters' evaluations of applicants' job competencies (Huang et al., 2013; Chen et al., 2011) and person-job and person-organization fit (Kristof-Brown, 2000; Tsai et al., 2011).

The human capital perspective and signaling theory can be applied to understand the relationship between job applicants' characteristics and hiring recommendations. Specifically, job applicants' characteristics, such as summarized in a résumé or for example learned through recommendations, generate managers' inferences about the applicants' personality (Cole et al., 2009) and work-related knowledge, skills and attributes (Chen et al., 2011). Through these inferences, managers will form predictions about the applicant's suitability and performance for the job position, as well as the applicant's fit within the broader context of the organization (Cable & Judge, 1997; Cole et al., 2007; Edwards, 1991; Tsai et al., 2011). In other words,

managers use the human capital-related characteristics of the job applicant to form evaluations about the potential productivity of the job applicant (Becker, 1975; Thurow, 1975). Furthermore, because the information in a résumé is limited and the predictions about a job applicant's productivity are therefore inherently uncertain, managers may draw further inferences about the job applicant based on signals that are provided in the job application process (Bangerter et al., 2012; Protsch & Solga, 2015; Spence, 1973). For example, long unemployment spells or a large number of different employers over the career of an older worker may signal an applicant's lack of loyalty or an inability to perform up to expectations (Bills, 1990). Even though such inferences may be unjustified or incorrect, they matter because they influence managers' decisions whether or not to invite the job applicant for a job interview (Cole et al., 2009).

A job applicant's *qualifications* are central to the managers' inferences about the applicant (Brown & Campion, 1994). Qualifications encompass skills, knowledge, abilities, education, and experience that are useful for the ability to perform in a job (Erdogan et al., 2011). When a manager perceives a lack of qualifications on the part of the job applicant, in other words when the job applicant is underqualified, the manager is likely to infer a lack of person-job fit, which would lead to a lower likelihood to invite the job applicant to a job interview for further evaluation (Tsai et al., 2011). Overqualification, in other words when the job applicant possesses qualifications that exceed job requirements (Erdogan et al., 2011), is also expected to lead to a lower likelihood of the manager to invite the job applicant for a job interview. This is because managers may find overqualified personnel harder to motivate and fear such employees may leave when a job better suited to their qualifications becomes available (Martinez et al., 2014; Wald, 2005).

H1: Managers are less likely to invite job applicants who are (a) overqualified or (b) underqualified to a job interview than those whose qualifications meet the job requirements.

As mentioned earlier, managers may interpret signals provided in the application to make inferences about job applicants' human capital (Bills, 1990; Protsch & Solga, 2015; Spence, 1973). Such inferences may lead to discrimination when individuals are judged based on the generalized characteristics of the group they belong to (Akerlof, 1970; Thurow, 1975). One particularly important signal in this respect is the job applicant's *employment status* (Bills, 1990; Lockwood, 1991). More specifically, older job applicants who are unemployed at the time of application may be perceived by managers to be less competent and have lower human capital than older job applicants who are employed elsewhere at the time of application (Karren & Sherman, 2012; Lockwood, 1991). Even though the reason for unemployment may not be observable from the

job application, the notion that some may be unemployed due to a lack of human capital may create a 'lemon car effect' (Akerlof, 1970), and thereby tarnish all job applications from unemployed job applicants (Karren & Sherman, 2012).

H2: Managers are more likely to invite job applicants who are employed elsewhere to a job interview than those who are unemployed.

Furthermore, managers may base their inferences of job applicants' human capital and expected productivity on *recommendations* from relevant sources. Letters of recommendation are regularly used in the personnel selection process, predominantly because they may include information about past performance and personality traits that may signal a good person-job fit (Muchinsky, 1979). However, a common problem is that letters of recommendation include solely positive traits of job applicants, and are considered nondiscriminative and nondifferentiating by managers (e.g., Baxter et al., 1981). This may be different when the recommendation for a job applicant comes from a source that is well known by the manager and perceived as trustworthy, as these sources put their reputation at stake by making a recommendation for a specific job applicant (Marsden & Gorman, 2001). In other words, a recommendation from a trustworthy source for a particular job applicant may increase the manager's perception of that applicant's suitability for the job. Two possible trustworthy sources are current employees of the organization, who may be able to judge first-hand whether the job applicant they recommend possesses the necessary human capital for a satisfactory performance, or fellow employers or managers that the recruiting manager deems trustworthy, as they are involved in personnel selection themselves and are better able to judge the organization's needs.

H3: Managers are more likely to invite job applicants who are recommended by (a) a current employee of the organization or (b) a trustworthy fellow employer to a job interview than those who do not have such recommendations.

Boundary Conditions of the Effects of Human Capital-Related Characteristics

The *general economic conditions* in which an organization operates has wide-ranging implications for organizations' human resource practices and operations (Robie et al., 2011; Jackson & Schuler, 1995). For example, Y. Kim and Ployhart (2014) showed that organizations that diversified their staffing and training practices before, during, and after the Great Recession were more productive and profitable in the long run. However, whether and how an economic recession influences the personnel selection process of organizations has received little attention. In the current study, we follow Y. Kim and Ployhart (2014) by studying the effects of a change in

the general economic conditions in a two-wave design. By comparing data from two time points, between which the economy was in recession, we are able to investigate how the general economic conditions affects managers' evaluation of older job applicants. Specifically, we investigate both a direct effect of the general economic conditions on managers' interview invitation decision for older job applicants, and a moderation effect of the general economic conditions on the effect of older job applicants' human capital-related characteristics.

First, the general economic conditions are expected to directly affect managers' evaluations of older job applicants through a labor supply effect. In an economic recession, unemployment rises and the supply of labor increases. In other words, there will be a larger number of job applicants for the same number of job openings. There is little reason to believe the number of job applicants invited for an interview changes as the number of job applicants change (Robie et al., 2011), which implies that when the supply of labor increases, any single job applicant is less likely to be invited for an interview. Conversely, when economic conditions are comparatively better, there will be fewer job applicants, and job applicants are more likely to be invited for an interview.

H4: Managers are more likely to invite older job applicants to a job interview when the general economic conditions are better than when they are worse.

Further, we expect a moderation effect of the general economic conditions on the effects of human capital-related characteristics on managers' interview decisions for older job applicants for two reasons. First, from a human capital perspective, when the supply of labor increases during a recession, there will be more job applicants available with desirable human capital-related characteristics, such as the right qualifications for the job, relevant job history, and recommendations from sources who the hiring manager deems trustworthy (Robie et al., 2011). As such, managers will be less likely to invite job applicants who lack such characteristics for interviews. Second, when there is a recession, organizations usually face a large negative shock in their business environment, which may result in organizational readjustment and cost-reduction programs (Van Dalen & Henkens, 2013). Difficult economic conditions such as a recession may thus lead to heavy scrutiny of organizational operations, which includes the process of personnel selection. This, in turn, may lead to managers relying more on well-justified human capital-related characteristics for making their interview decisions.

H5: General economic conditions will moderate the effect of older job applicants' qualifications on managers' likelihood of inviting job applicants to job interviews, such that the negative effects of (a) overqualification and (b) underqualification will be stronger in worse general economic conditions.

H6: General economic conditions will moderate the effect of older job applicants' employment status on managers' likelihood of inviting job applicants to job interviews, such that the positive effect of job applicants' employment status will be stronger in worse general economic conditions.

H7: General economic conditions will moderate the effect of older job applicants' recommendation status on managers' likelihood of inviting job applicants to job interviews, such that the positive effects of having a recommendation from (a) a current employee and (b) a trustworthy fellow employer will be stronger in worse general economic conditions.

Because economic conditions affect organizations in different ways, it is important to also consider within-organization developments over time, as they affect human resource management practices (Jackson & Schuler, 1995) and are therefore expected to also influence managers' evaluations of older job applicants. Here, we examine *managers' experience of changes in job demands in the organization* as a moderator of the effects of job applicants' human capital-related characteristics on managers' evaluation of older job applicants. Job demands are defined as the amount of physical or psychological effort that is required by the job (Demerouti et al., 2001; Schaufeli et al., 2009). Managers' experience of changes in job demands in the organization are more important than objective changes in job demands or workers' experiences, because managers are likely to draw on their own experience in analyzing what is needed for a job and making personnel decisions (Morgeson & Campion, 1997).

We do not expect a main effect of changes in job demands, but do expect that an increase in job demands will lead managers to be more selective in their interview invitation decisions, and that human capital indicators will be more important. According to the human capital perspective, workers with higher levels of human capital are more productive and are therefore less likely to experience high workload or stress in response to increasing job demands than workers with lower levels of human capital (Cole et al., 2007; Schaufeli et al., 2009). In other words, job applicants with higher levels of human capital are expected to be more resilient in the face of high job demands. Since the human capital of job applicants is inferred from characteristics such as qualifications, employment status, and relevant recommendations (Chen et al., 2011; Tsai et al., 2011), managers are expected to value these characteristics more favorably when they experienced increases in job demands themselves.

H8: Managers' experience of changes in job demands will moderate the effect of job applicants' qualifications on managers' likelihood of inviting job applicants to job interviews, such that the negative effects of (a) overqualification and (b) underqualification will be stronger for managers who have experienced an increase (vs. a decrease) in job demands.

H9: Managers' experience of changes in job demands will moderate the effect of job applicants' employment status on managers' likelihood of inviting job applicants to job interviews, such that the positive effect of job applicants' employment status will be stronger for managers who have experienced an increase (vs. a decrease) in job demands.

H10: Managers' experience of changes in job demands will moderate the effect of job applicants' recommendation status on managers' likelihood of inviting job applicants to job interviews, such that the positive effects of having a recommendation from (a) a current employee and (b) a trustworthy fellow employer will be stronger for managers who have experienced an increase (vs. a decrease) in job demands.

Method

Sample and Procedure

Two waves of a vignette experiment (also known as a factorial survey; Rossi & Anderson, 1982; Wallander, 2009) were conducted in 2010 and 2013 with a sample of managers from the Longitudinal Internet Studies for the Social Sciences (LISS) panel of CentERdata, Tilburg University. The vignette experiments were embedded in broader questionnaires about managers' images of younger and older workers, and participants were not informed of the specific purpose of the vignette experiments. The LISS panel consists of a representative sample of Dutch inhabitants who participate in monthly internet surveys on a variety of topics (Scherpenzeel & Das, 2010; more information can be found at <http://www.lissdata.nl>). For the current study, we randomly selected a sample of 700 managers who had indicated to work in a management position and to be responsible for recruitment, selection, and hiring of employees in their organization. 426 out of the 700 approached managers responded in the first wave of the study in May of 2010, for a response rate of 60.9%. Shortly before the second wave of the vignette experiment, participants were asked to complete a brief questionnaire on changes in their organization since the first experiment. This questionnaire was separated from the second wave of the vignette experiment to limit the risk of carryover effects (Tourangeau et al., 1989). Of the 426 initial respondents, 275 participated in the second wave of the vignette experiment in April of 2013, for a retention rate of 64.6%. Managers who changed jobs, had gotten unemployed or had retired between the two waves of the vignette experiment ($n = 64$) were excluded from the analysis, rendering a final sample size of 211. The average age of managers was 48.35 years old ($SD = 9.44$) at the time of the second vignette experiment. The majority of managers in the sample were male (70.1%). 23.2% of the managers worked in the industry and construction

sector, 22.8% in the services and trade sector, 25.6 in the public sector, and 28.4% in other non-specified sectors⁹.

A vignette experiment combines survey questions with experimental methods, and is considered especially suitable to uncover the underlying structure of human judgments in social contexts (Rossi & Anderson, 1982; Wallander, 2009). Participants in this type of experiment usually see a vignette that contains descriptive information about the situation, after which they are prompted for their judgment. In the current study, the vignettes contained variables on three human capital-related characteristics of the older job applicant (qualifications, employment status, and recommendation) and two control variables (applicant's age and gender). The values on these vignette factors are randomized, so that each combination of values is equally likely (an example of a random vignette is presented in Figure 4.1). Because of this, the vignette factors are independent of each other and their effects can be reliably estimated (Wallander, 2009). It is common to have participants complete multiple vignettes, in order to increase the reliability of the estimates and to be able to assess both between-subject and within-subject effects (Wallander, 2009). In the current study, participants completed five vignettes in each wave, so there were ten observations for each participant. Our final sample thus consisted of 2,110 vignette observations from 211 participants, evenly split over the two waves.

Figure 4.1. Example of a vignette.

Consider a situation where your organization is looking for new employees. You will be shown key characteristics of several job applicants. Please indicate, for each applicant, the likelihood that you would select this person for a job interview.

Age	54 years
Gender	Female
Qualifications	Underqualified
Employment status	Still employed elsewhere
Recommendation	From one of your current employees

What is the likelihood that you would select this person for a job interview?

1	2	3	4	5	6	7	8	9	10	11
Very unlikely					Neutral					Very likely

⁹ The managers' age, gender, and the industry of their organization did not significantly influence the dependent variable or moderate other effects, and are therefore not included in the models presented here.

Measures

Qualifications. Job applicants' qualifications were manipulated. Applicants were described in the vignettes as "underqualified", "qualified", or "overqualified." We used the "qualified" category as the reference category in the analysis for this variable.

Employment status. Job applicants' employment status was manipulated. Applicants were described in the vignettes as either "employed elsewhere" or "unemployed". We used the "unemployed" category as the reference category in the analysis for this variable.

Recommendation. Job applicants' recommendation was manipulated. Applicants were described in the vignettes as "recommended by a current employee", "recommended by a trustworthy fellow employer", or had "no recommendations." We used the "no recommendations" category as the reference category in the analysis for this variable.

General economic conditions. The general economic conditions were assessed with a dummy for the year in which the experiment took place. Observations under relatively worse general economic conditions (April 2013) were coded 0; observations from relatively better general economic conditions (May 2010) were coded 1.

Managers' experience of changes in job demands. In the questionnaire conducted two months before the second wave of the vignette experiment, managers' experience of changes in job demands was assessed with a single question that read "In the last 3 years, how did the job demands change in your organization?" The answers were recorded on a 5-point scale (1 = "strongly decreased"; 3 = "remained the same"; 5 = "strongly increased").

Interview invitation decision. The managers' decision whether or not to invite a job applicant for an interview was measured on a scale from 1 ("very unlikely") to 11 ("very likely").

Control variables. Job applicants' age was manipulated and appeared on the vignette. Applicants were 50, 54, 58, or 62 years old, with 62 as the reference category in analysis. Job applicants' gender was also manipulated in the vignette, with female as the reference category in the analysis.

Analytic Strategy

The data contained a nested structure, with responses to 10 vignettes nested within each participant. Therefore, we performed multilevel modeling to account for this data structure in Mplus 7 software (Muthén & Muthén, 2012). Specifically, a two-level model was specified. At Level 1 (i.e., the within-individual level), we created a dummy variable for year to distinguish between vignettes from the two different general economic conditions (i.e., 0 = "2013" and 1 =

“2010”) and five other sets of dummy variables for applicants’ qualifications, employment status, recommendation, age, and gender. The interaction terms between general economic conditions and applicants’ human capital-related characteristics were created by multiplying the dummy variables accordingly. We then specified the random effects (i.e., random slopes) of each vignette-based dummy variable, the fixed effect of the dummy variable of general economic conditions, as well as the fixed effects of general economic conditions by human capital characteristic interaction terms on likelihood of job interview. At Level 2 (i.e., the between-individual level), we specified the fixed effects of managers’ experience of changes in job demands (grand-mean centered before analysis) on likelihood of job interview and on the random slopes we specified at Level 1.

Results

Preliminary Analysis

Means, standard deviations, and correlations of the non-manipulated study variables are presented in Table 4.1. Overall, participants were on average slightly unlikely to invite older job applicants to an interview (Mean = 5.33; within-person $SD = 2.41$; between-person $SD = 1.58$). One-way random-factor analysis of variance results showed that the between-person variances were significant for the dependent variable, intraclass correlation coefficient ($ICC1 = .35$, $F(210, 1,899) = 6.43$, $p < .01$, warranting the use of multilevel modeling for analyzing the current data.

Table 4.1. Means, Standard Deviations, and Correlations of Non-Manipulated Study

Variable	Mean	Within-person SD	Between-person SD	1	2	3	4
1. Respondent's age	48.35		9.44				0.04
2. Respondent's gender	0.30		0.46	-0.03			-0.01
3. Change in job demands	3.82		0.87	0.07	0.11		-0.03
4. Likelihood of selecting applicant for job interview	5.33	2.41	1.58	0.06	-0.02	-0.04	

* $p < .05$; ** $p < .01$.

Note: The vignette characteristics were random, so they are not significantly correlated with each other or other variables. Correlations below the diagonal represent between-subject correlations ($N = 211$). To calculate the between-subject correlation for the dependent variable (i.e., likelihood of selecting applicant for job interview) we averaged the within-subject scores. Respondent’s gender was scored 0 for men and 1 for women. Correlations above the diagonal represent within-subject correlations ($N = 2,110$).

Further, the average score of managers' experience of changes in job demands (Mean = 3.82; $SD = 0.87$) indicates that, on average, managers experienced an increase of job demands in their organizations between 2010 and 2013.

Hypothesis Testing

Unstandardized coefficient estimates for the model are presented in Table 4.2. Model I presents a baseline model which only contains Level-1 main effects of job applicants' characteristics and the general economic conditions on managers' likelihood of inviting job applicants for interview. Applicant's qualifications were related to managers' interview invitation decisions in the expected direction. Managers were less likely to invite job applicants that were either underqualified ($\gamma = -1.58, p < 0.01$) or overqualified ($\gamma = -0.24, p < 0.05$) than those that had qualifications fitting the job description. This supports Hypothesis 1. Further, managers were more likely to invite job applicants that were employed elsewhere than applicants that were unemployed ($\gamma = 0.39, p < 0.01$), providing support for Hypothesis 2. Managers were also more likely to invite job applicants with a recommendation from a current employee of the organization ($\gamma = 0.34, p < 0.01$) or from a fellow employer ($\gamma = 0.33, p < 0.01$) than those with no recommendation. This provides support for Hypothesis 3. These results indicate that older job applicants' human capital-related characteristics are very important for managers to make the decisions regarding whether or not to invite them for job interview.

We also found that managers' likelihood to invite older job applicants for job interview was higher when general economic conditions were better (i.e., in May 2010) than when general economic conditions were worse (i.e., in April 2013), $\gamma = 0.55, p < 0.01$. This supports Hypothesis 4, indicating that managers' likelihood to invite older job applicants for job interview was higher in better general economic conditions.

In Model II, the interaction effects between the general economic conditions and the applicants' characteristics were added, as well as the cross-level interaction effects between managers' experience of changes in job demands and applicants' characteristics, and the between-individual main effect of managers' experience of changes in job demands. Snijders and Bosker's (1999) formulas were used to calculate pseudo- R^2 ($\sim R^2$) for the effect sizes in predicting the outcome variable. All predictors included in the model accounted for 19% of the total variance in managers' interview invitation decisions, suggesting the model explained a sizeable portion of the variation in the outcome variable. As presented in Table 4.2, the majority of the main effects of human capital-related characteristics on managers' likelihood of inviting job applicants for

Table 4.2. Unstandardized Coefficients of the Multilevel Model

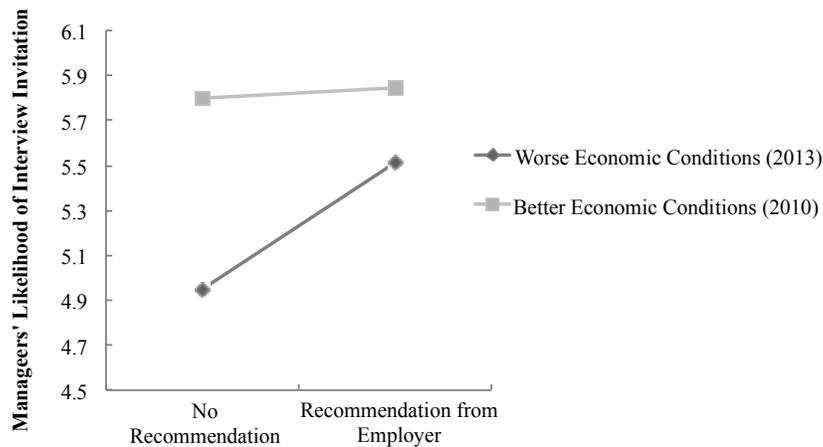
Variable	Likelihood of selecting applicant for job interview (Model I)		Likelihood of selecting applicant for job interview (Model II)	
	Estimate	SE	Estimate	SE
Fixed effects				
Intercept	5.08 ***	0.17	4.95 ***	0.20
Applicant underqualified (ref. = qualified)	-1.58 ***	0.13	-1.42 ***	0.17
Applicant overqualified (ref. = qualified)	-0.24 *	0.11	-0.13	0.15
Applicant employed elsewhere (ref. = unemployed)	0.39 ***	0.09	0.36 **	0.12
Applicant recommendation from employee (ref. = no recommendation)	0.34 **	0.11	0.42 **	0.15
Applicant recommendation from employer (ref. = no recommendation)	0.33 **	0.10	0.56 ***	0.13
Applicant age 50 years (ref. = 62 years)	0.64 ***	0.12	0.66 **	0.20
Applicant age 54 years (ref. = 62 years)	0.55 ***	0.12	0.62 ***	0.17
Applicant age 58 years (ref. = 62 years)	0.18	0.10	0.05	0.16
Applicant male (ref. = female)	-0.09	0.08	-0.16	0.11
General economic conditions (GEC)	0.55 ***	0.15	0.85 **	0.29
Changes in job demands (CJD)			-0.16	0.20
GEC * Underqualified			-0.31	0.21
GEC * Overqualified			-0.25	0.21
GEC * Employed elsewhere			0.06	0.17
GEC * Recommendation from employee			-0.20	0.20
GEC * Recommendation from employer			-0.51 **	0.19
GEC * Age 50 years			-0.02	0.26
GEC * Age 54 years			-0.18	0.23
GEC * Age 58 years			0.24	0.21
GEC * Male			0.15	0.16
CJD * Underqualified			-0.24	0.15
CJD * Overqualified			0.04	0.13
CJD * Employed elsewhere			0.05	0.10
CJD * Recommendation from employee			0.38 **	0.12
CJD * Recommendation from employer			0.14	0.12
CJD * Age 50 years			0.21	0.13
CJD * Age 54 years			-0.13	0.13
CJD * Age 58 years			-0.08	0.11
CJD * Male			-0.06	0.08
Variance components				
Level 1 residual variance	2.51 ***	0.20	2.47 ***	0.20
Level 2 residual variance	2.03 ***	0.27	1.94 ***	0.27

* $p < 0.05$; ** $p < 0.01$; *** $p < 0.001$

Note: GEC = General Economic Conditions; CJD = Changes in Job Demands

interview still held significant, except for the effect of overqualified vs. qualified ($\gamma = -0.13, p > 0.05$). Further, Model II shows that the interaction effects between the general economic conditions and the applicants' qualifications and employment status were not significant, providing no support for Hypotheses 5 and 6. However, the interaction between general economic conditions and the applicant being recommended by a fellow employer was significant ($\gamma = -0.51, p < 0.01$) in predicting managers' job interview decisions. This interaction effect is illustrated in Figure 4.2, which shows that managers were more likely to invite applicants who hold a recommendation from a fellow employer than those with no recommendations when the general economic conditions were worse. This finding provides support for Hypothesis 7b (but not Hypothesis 7a), indicating that a recommendation from a fellow employer was more strongly associated with managers' job interview decisions when the general economic conditions were worse.

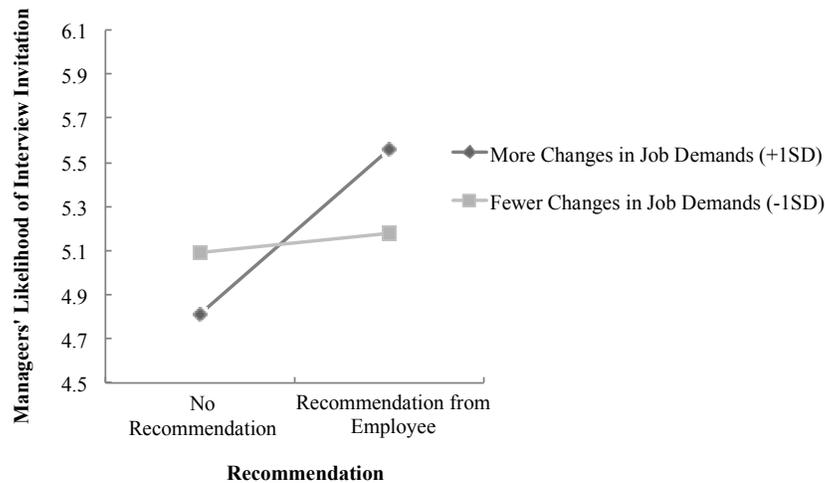
Figure 4.2. Illustration of the interaction effect between general economic conditions and applicants' recommendations.



With regard to changes in job demands, Table 4.2 shows that the interaction effects between changes in job demands and the applicants' qualifications and employment status were not significant, providing no support for Hypotheses 8 and 9. There is an interaction effect between changes in job demands and the applicant being recommended by an employee of the organization ($\gamma = 0.38, p < 0.01$) in predicting managers' job interview decisions. This interaction effect is illustrated in Figure 4.3, which shows that when managers had experienced an increase (vs. decrease) in the level of job demands in recent years, they were more likely to invite older job applicants with a recommendation from a current employee of the organization to an interview

than those with no recommendations. This provides support for Hypothesis 10a (but not Hypothesis 10b), indicating that a recommendation from an employee of the organization was more strongly associated with managers' job interview decisions when they had experienced an increase in job demands.

Figure 4.3. Illustration of the interaction effect between managers' experience of changes in job demands and applicants' recommendations.



Discussion

In the current study, we found that managers' interview invitation decisions regarding older job applicants were strongly associated with applicants' human capital-related characteristics. In particular, managers were more likely to interview older job applicants who had matching qualifications than those who were underqualified or overqualified, who were employed elsewhere over those who were unemployed, and who had recommendations from an employer or an employee of the organization over those who did not have such recommendations. Also, managers were more likely to invite older job applicants to an interview in better general economic conditions than in worse general economic conditions. Further, the effects of applicants' recommendations on managers' interview invitation decisions were moderated by the general economic conditions and managers' experiences of changes in job demands, with a recommendation from a fellow employer being especially relevant in bad economic conditions, and a recommendation from an employee within the organization being especially relevant when job demands had increased.

We did not find the hypothesized interaction effects between the other two human capital-related characteristics (i.e., applicants' qualifications and employment status) and general economic conditions and changes in job demands. A possible reason might be that job applicants' qualifications and employment status were extremely important in managers' decision-making regarding interview invitation. Therefore, regardless of economic and organizational contexts, the effects of these human capital-related characteristics appeared to be quite robust.

Theoretical and Practical Implications

The current findings have important theoretical and practical implications. First, theoretically, our findings support the human capital mechanism that has been suggested in earlier studies (e.g., Chen et al., 2011; Cole et al., 2007; Tsai et al., 2011), and thus shows that human capital-related characteristics are one of the most important drivers of managers' interview invitation decisions when screening older job applicants. More specifically, we found that underqualification and overqualification were both harmful to older job applicants' interview opportunity, but that underqualification was about 6 to 7 times more harmful than overqualification in terms of its predictive effect. This supports the suggestion by Erdogan et al. (2011) that overqualification should not be as detrimental for older workers as it is for younger workers, because older workers are often more motivated to provide support and mentor others than younger workers, and as such are less likely to display high turnover rates and low motivation that are often observed among overqualified employees. Further, our results offer support for the notion that the unemployment status may manifest as a stigma that can lead to unjustified perception of lower human capital on the part of job applicants, which may be especially relevant for vulnerable groups such as older workers (Karren & Sherman, 2012).

Second, our results also indicate that managers were more likely to invite older job applicants to a job interview when general economic conditions were better, and that general economic conditions and managers' experiences of changes in job demands moderated the effects of applicants' recommendations on managers' interview invitation decisions. These findings support previous research that suggests general economic conditions affecting organizations' human resource practices in various ways, which may specifically affect older workers or older job applicants (Robie et al., 2011; Van Dalen & Henkens, 2013). With regard to the effects of recommendations, our results showed that recommendations from a fellow employer were especially important in bad economic conditions, whereas a recommendation from an employee of the organization was especially important when job demands had increased in recent years. This may be because managers trust other employers to be better able to judge whether a job

applicant is suitable for an organization in rough general economic conditions, whereas managers may trust current employees of the organization more to judge whether the job applicant can deal with the job demands in the organization.

Moreover, although not the prime focus of this study, we did find a negative effect of applicants' age on managers' interview invitation decision. This corroborates findings from earlier studies regarding age discrimination in hiring (Roscigno et al., 2007), and shows that even within the group of older job applicants, age negatively affects labor market success (Karpinska et al., 2013a; Oude Mulders et al. 2014). The results do not show any interaction effects between applicants' age and general economic conditions and changes in job demands, suggesting that within the group of older job applicants, the young-old job applicants were not less negatively affected by difficult economic or organizational circumstances than old-old job applicants. This finding informs the changing legislative framework in which employers operate and supports the notion that both young-old and old-old job applicants deserve the same level of protection in the face of adverse labor market conditions (Beck, 2013).

Practically, on the policy level, although most developed countries have anti-age discrimination legislation in place, Neumark and Button (2014) have found that such legislation has not been particularly helpful in protecting older workers, and may sometimes even be detrimental to older workers' employment potentials. Addressing the disadvantage that older workers and job applicants may face, our findings suggest that older job applicants themselves can increase their chances of job market success by updating their qualifications during their career. Also, policy makers could try to make training more attainable for older job workers so their qualifications are more in line with changing job requirements. Organizations can also try to adjust their job design and personnel selection procedure to attach more value to older job applicants' experience and mentoring skills (Wang et al., 2013).

Limitations and Future Research

This study has several limitations. First, an inherent limitation of the vignette experiment method is that participants judge hypothetical situations, which limits the generalizability of the findings (Hainmueller et al., 2015; Wallander, 2009). In particular, real world selection managers or recruiters have more detailed information available about job applicants than we were able to provide in the experiment. In addition, the judgments in the experiment are without consequences for the managers and their organizations, which may imply an underestimation of the effects of several important factors (Pager & Quillian, 2005). Still, we studied the interview invitation decision in a sample of real world managers, who in reality also judge an applicant's

résumé on paper or on screen without meeting the applicant in person (Derous et al., 2015; Landy, 2008). It is important for future research to study both actual behavior and improve the external validity of research by using designs that mimic real-world incentives for the participants, such as the paired conjoint design (Hainmueller et al., 2015).

Second, the study design limited the opportunity to examine interaction effects. This applies especially to factors manipulated at Level 1, because a full factorial design is impossible given the amount of Level 1 variables that we studied in the current study and the small amount of vignettes that we asked the managers to evaluate. Future studies using large field samples (i.e., measuring characteristics of real job applicants) may be able to allow the evaluation of more interaction effects.

Third, we assessed changes in job demands with a single-item measure, two months before the second wave of the vignette experiment. Although the measure of changes in job demands was separated from the vignette experiments to limit carryover effects, future studies could increase the validity and reliability of the measure by assessing job demands at each wave of the experiment and computing change scores, as well as by using previously established multi-item scales, such as parts of the Questionnaire on the Experience and Evaluation of Work (QEEW; e.g., Schaufeli et al., 2009) or the Job Content Questionnaire (JCQ; Karasek et al., 1998).

Next to addressing these limitations, future research could try to expand on our findings by considering other types of personnel selection decisions and employment outcomes for older job applicants and older workers (Wang et al., 2015). Also, future research may focus on other organizational factors that may moderate the relationship between older job applicants' characteristics and organizations' human resource management decisions, such as the age composition of the organization's workforce, the organization of work in teams, and whether the organization has gone through restructuring (Jackson & Schuler, 1995). In addition, future studies may try to replicate and expand on our findings focusing on a different country or studying national and cultural variation in a multi-country study (Ryan et al., 1999).

Conclusion

The current study demonstrated that managers' interview invitation decisions regarding older job applicants were strongly associated with the applicants' human capital-related characteristics, and were also affected by the general economic conditions. Furthermore, the effect of older job applicants' recommendations on managers' interview invitation decision was moderated by the general economic conditions and the changes in job demands. The findings suggest that older workers should pay attention to updating their human capital during their career, and employers

and policy makers should create opportunities to facilitate that. Older job applicants also have to consider getting recommendations that come from relevant sources to improve their chances across different economic conditions and organizational contexts.

Chapter 5

European top managers' age-related workplace norms and their organizations' recruitment and retention practices regarding older workers

Jaap Oude Mulders, Kène Henkens, & Joop Schippers

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Abstract

Top managers guide organizational strategy and practices, but their role in the employment of older workers is understudied. We study the effects that age-related workplace norms of top managers have on organizations' recruitment and retention practices regarding older workers. We investigate two types of age-related workplace norms, namely age equality norms (whether younger and older workers should be treated equally) and retirement age norms (when older workers are expected to retire), while controlling for organizational and national contexts. We use data collected among top managers of 1088 organizations from six European countries. We run logistic regression models to estimate the effects of age-related workplace norms on four different organizational outcomes: (1) recruiting older workers; (2) encouraging working until normal retirement age; (3) encouraging working beyond normal retirement age; and (4) rehiring retired former employees. Age-related workplace norms of top managers affect their organizations' practices, but in different ways. Age equality norms positively affect practices *before* the boundary of normal retirement age (outcomes 1 and 2), while retirement age norms positively affect practices *after* the boundary of normal retirement age (outcomes 3 and 4). Changing age-related workplace norms of important actors in organizations may be conducive to better employment opportunities and a higher level of employment participation of older workers. However, care should be taken to target the right types of norms, since targeting different norms may yield different outcomes.

Introduction

Under pressure of population aging and its adverse effects on the economy, governments of Western countries have tried to increase the labor force participation of older workers. After many years of labor market and retirement reforms, employment participation among older workers is rising and retirement ages are gradually increasing. In addition to the lower prevalence of early retirement and thus increasing employment participation of older workers *before* the “normal retirement age” of 65¹⁰, the prevalence of employment *after* normal retirement age has also increased (Cahill et al., 2015; Pleau & Shauman, 2012). This increase is visible in countries where mandatory retirement is generally unlawful, such as the US and UK, but also in countries where mandatory retirement at the normal retirement age is commonly built into collective bargaining agreements, such as in many continental European countries.

From an economic perspective, these changes are mainly supply-side driven: as a result of population aging, closed-off pathways into early retirement, decreased retirement benefits, and changing retirement preferences, there are more older workers in the labor market that seek employment until and beyond normal retirement age (Dingemans et al., 2016; European Commission, 2015). On the demand-side, most organizations are reluctant to recruit or retain older workers on a large scale. All else equal, younger workers are usually preferred over older workers, for example in advancement, selection, and overall evaluation (Bal et al., 2011), and age is negatively related to reemployment success, especially after the age of 50 (Wanberg et al., 2016).

A key finding is that organizations appear to deal with retention and recruitment issues regarding older workers in a non-systematic or case-by-case way (Hutchens & Grace-Martin, 2006; Oude Mulders et al., 2015; Vickerstaff, 2006a): in general there are no or limited policies regarding recruitment and retention of older workers, and decisions about the (prolonged) employment of older workers appear to be made on other grounds. However, it is largely unclear how such organizational decisions can be explained. To help answer such questions, we study the role of top managers more closely. It is well established that organizational outcomes may depend crucially on the values and dispositions of powerful actors within the organization (Hambrick & Mason, 1984), especially concerning factors such as setting and guiding organizational strategy and exploring new directions (S. Finkelstein et al., 2008). While it has been suggested that top managers shape frameworks for hiring and decision-making for lower level

¹⁰ In this study, we refer to the “normal retirement age” of 65, since this was the age at which public pension started in many countries, and at which age full retirement was usually possible. In addition, in the European countries studied here, at the time of the survey, 65 was the most common age of mandatory retirement.

managers (S. Finkelstein et al., 2008), it is unclear what role top managers may play in shaping opportunities for the employment of older workers, especially concerning relatively uncommon modes of employment, such as working beyond normal retirement age, that fall outside the institutionalized norm of normal retirement age.

In the current study, we investigate how top managers' *age-related workplace norms* affect practices regarding recruitment and retention of older workers up to and beyond normal retirement age. We conceptualize age-related workplace norms as top managers' individual beliefs about age related issues in the workplace, which may be influenced by factors such as the organizational and societal context, institutional factors and stereotypical thinking (Lawrence, 1996; Settersten & Hagestad, 1996). Age-related workplace norms have been shown to influence employment decisions regarding older workers in various settings (e.g., Karpinska et al., 2013a; 2013b; Lindner et al., 2014), but norms of top managers have not been studied before. Workplace norms that are considered here are the norms regarding equal treatment of younger and older workers on the labor market (age equality norms) and norms about the appropriate timing of retirement of older workers (retirement age norms).

This study contributes to the literature in three main ways. First, this study is unique in its focus on how top managers affect their organizations' practices with regard to recruitment and retention of older workers. While line managers and HR managers have received some attention in the literature (e.g., Kooij et al., 2014; Oude Mulders et al., 2014) and have some autonomy to influence organizational practices, the power to determine organizations' practices more broadly ultimately lies with top management (S. Finkelstein et al., 2008). Top managers not only have the autonomy to decide how to act with regard to recruitment and retention of older workers, but also influence the decision-making of others, and are responsible if the practices do not work out in the desired way. This sets them aside from lower level managers or HR employees, whose degree of autonomy and responsibility is considerably lower.

Second, we consider four different recruitment and retention practices regarding older workers: (1) recruitment of older workers from outside the organization before normal retirement age; (2) encouraging retention of older workers until and (3) beyond normal retirement age; and (4) rehiring former employees that retired. This way, we recognize that different factors may affect organizations' practices regarding older workers *before* and *after* the boundary of normal retirement age, which can be seen as an institutionally created and publicly accepted norm of when people should retire. Also, we recognize that different factors may influence behavior towards older workers within or outside of the organization. Because actual retention of workers until and beyond normal retirement age is contingent upon those employees accepting to work

longer, the retention measures should be understood as the organization creating a supportive climate for working until or beyond normal retirement age.

Third, we utilize unique data that combines personal information of top managers, such as their age-related workplace norms, with information on their organizations' backgrounds and HR policies. We study a sample of 1088 top managers from six European countries with different institutional contexts. This provides a broad empirical base for studying the impact of top managers' age-related workplace norms on organizational practices regarding recruitment and retention of older workers, and allows us to assess the importance of top managers' age-related workplace norms relative to other organizational and societal factors.

Theoretical Background

Age-related workplace norms

Norms are a central concept in sociological explanations of demographic transitions such as leaving the parental home, family formation, and child bearing (Liefbroer & Billari, 2010). Although less commonly studied, behavior regarding workplace transitions such as promotions and retirement may also be influenced by norms (Radl, 2012; Settersten & Hagestad, 1996). Age-related workplace norms may be especially important for issues such as prolonged employment of older workers and their timing of retirement, considering decades of shaping expectations and behavior of people through institutionalization of retirement and public policies (Kohli, 2007; Radl, 2012). For example, the age of 65 is considered the 'normal retirement age' in most of the developed world, which is at the same time a result from and supported by public policies such as state pension ages of 65 in many countries (Hofäcker, 2015).

Norms are statements or views that have an 'ought' character (Liefbroer & Billari, 2010). In other words, they describe how things should or should not be, or what people should or should not do. Norms influence behavior either through the threat of punishment or through the internalization of norms (Liefbroer & Billari, 2010; Radl, 2012). Norms are social in nature, but each individual has their own conception of a norm. That is, individuals have ideas about how things should or should not be, or when things should happen in a person's life, and aggregated over groups of individuals this becomes a social norm (Radl, 2012; Settersten & Hagestad, 1996).

Here, we argue that top managers' age-related workplace norms are likely to affect organizations' practices regarding recruitment and retention of older workers, directly through top managers' decisions, or indirectly through lower level managers' decisions. When top managers are themselves involved in recruitment and selection of new employees and retention decisions of existing employees, their age-related workplace norms will directly influence their

decisions. If top managers' are not concerned with recruitment and retention decisions themselves, their age-related workplace norms may 'trickle down' through the organization, and thereby influence the decisions of lower level managers. Here, we specifically consider two types of age-related workplace norms: age equality norms, and retirement age norms.

Age equality norms

Age equality in the workforce refers to the equal treatment of (adult) people of all ages in the workforce, opposing differential treatment that is solely based on people's age. While age equality is an ideal that is supported by many governments through anti-age discrimination legislation (Leeson, 2006), age discrimination due to ageist preconceptions is still quite pervasive in the labor market (Roscigno et al., 2007), which means people either explicitly or implicitly do not fully subscribe to age equality (Malinen & Johnston, 2013). People may differ in the extent to which they find age equality in the workforce desirable, based on for example personal experiences with workers from different age groups and certain characteristics they ascribe to workers of different ages. Here, we argue that such age equality norms may influence organizational practices. We define age equality norms as the support for the equal treatment of younger and older workers on the labor market.

When it comes to age equality norms of top managers of organizations, some contributing factors can be identified. First, Van Dalen and Henkens (2005) showed that support for age equality has increased over time, but also that it is heavily influenced by national economic conditions. In particular, the support for age equality was high in good economic times, but tended to decrease substantially under bad economic conditions, when older workers were seen as "expenses that can be cut" (Van Dalen & Henkens, 2005, p. 708). Second, the organizational context in which managers operate may influence their age equality norms. For example, the type of work within an organization may be perceived to be especially suitable for younger or older workers, or managers may favor certain groups based on the existing level of age diversity within their organization. Third, managers may hold stereotypical views of workers from different age groups, which may inspire their views about age equality. Stereotypical views of older workers are common, and may include negative stereotypes, such as lower productivity, resistance to change, and a lower willingness to learn, or positive stereotypes, such as a higher reliability, dependability, and organizational commitment (Bal et al., 2011).

We expect that top managers' age equality norms are related to their organizations' recruitment and retention practices regarding older workers. Organizations where top managers support equal treatment of older and younger workers will be more likely to have practices aimed

at the recruitment and retention of older workers, whereas organizations where top managers favor younger workers over older workers will be less likely to have practices aimed at the recruitment and retention of older workers (Hypothesis 1).

Retirement age norms

A special type of norms, age norms are expectations about the age (range) at which specific transitions should be made (Lawrence, 1996; Settersten & Hagestad, 1996). The most relevant norms that may influence organizations' ways of dealing with the recruitment and retention of older workers are retirement age norms, or the expectations about when older workers should retire from work (Van Solinge & Henkens, 2007). Like any age norm, retirement age norms may specify one age at which one expects older workers to retire, or may be a range with lower and upper age limits for the retirement transition (Liefbroer & Billari, 2010).

Radl (2012) reported on the average retirement age norms in 14 European countries. Retirement age norms for men were relatively close to, and in some countries higher than the public pension age of 65. For women, the retirement age norms were much lower, and nowhere exceeded the age of 65. Over time, retirement age norms appear to be rising. Many developed countries, especially in Europe, used to have a strong 'early exit culture', in which it was common and completely accepted to retire well before the public pension age, and it was even expected of older workers to retire early to open up jobs for younger workers (Hofäcker & Unt, 2013; Van Dalen & Henkens, 2005). With the abolishment of early retirement opportunities and the closing off of 'alternative pathways' into early retirement people's expectations about when older workers should retire seem to have risen. For example, Karpinska and colleagues (2013b) report an average upper retirement age norm of 64.5 years among a sample of Dutch middle managers in 2010, and Oude Mulders and colleagues (2014) report an average upper retirement age norm of 65.7 years among a similar sample in 2013.

Retirement age norms of top managers are a reflection of their own experiences and personal values about the appropriateness of when to make the retirement transition, and of the observed attitudes and behavior in their social network (Radl, 2012; Settersten & Hagestad, 1996). Top managers will be more likely to explicitly open up recruitment and retention opportunities for older workers when they normatively expect older workers to work up to higher ages. In addition, expectations about late retirement may influence lower level managers to recruit and retain older workers. Conversely, top managers that have lower retirement age norms see older workers as unfit to work until higher ages, and thus normatively expect them to retire earlier, and will therefore be less likely to explicitly focus their recruitment and retention efforts

on older workers. To sum up, organizations where top managers hold higher retirement age norms are more likely to have practices aimed at the recruitment and retention of older workers than organizations where top managers hold lower retirement age norms (Hypothesis 2).

Organizational and national context

Top managers are expected to be very important in influencing their organizations' recruitment and retention practices regarding older workers, but the organizational and national contexts they operate in may also affect practices. Here, we control for a number of different factors at the organizational level and the country the organization is located in.

Age-based HR policies

HR policies that are specifically concerned with managing the needs and desires of older workers can be used by organizations to manage older workers in a way that is congruent with the organization's business strategy (Rau & Adams, 2013) and to signal the value that they attach to their mature workforce (Armstrong-Stassen, 2008a). Although general HR policies may also achieve these goals, the application of HR policies that are explicitly aimed at older workers shows that an organization acknowledges that older workers may differ from other employees in their needs and desires, and that such age-based HR policies may help to create a better working relationship (Armstrong-Stassen, 2008b). Although top managers may be able to influence the application of age-based HR policies to some extent, we assume here they are formed in a dynamic process that is subject to external and internal factors. Here, we control for four policies that may be closely related to the employment of older workers: training plans, early retirement opportunities, accommodation measures, and demotion (cf. Oude Mulders et al., 2015; Van Dalen et al., 2015).

Structural factors

Further, we include a number of structural factors at the organizational level that may be related to organizations' recruitment and retention practices regarding older workers as control variables. Specifically, we include the sector or industry of operation; the size of the organization; the workforce composition in terms of the percentage of older workers within the organization; and the labor market position of the organization, or more specifically, whether the organization has difficulties finding qualified personnel.

Finally, we control for the country the organization is located in. There are large differences in institutional contexts, welfare regimes and organizational cultures within Europe, which may

affect organizations' way of dealing with older workers (Conen et al., 2012b). Recruitment and retention practices of organizations may also differ per country based on the demographic composition of the workforces and economic conditions in the country. Although we expect country differences in the recruitment and retention practices regarding older workers, it goes beyond the scope of this paper to discuss the underlying processes (for a discussion on national differences in Europe see for example Hofäcker & Unt, 2013).

Methods

Data

The data were collected among employers in Denmark, Germany, Italy, the Netherlands, Poland, and Sweden between February and November 2009. In each country, a sample was drawn among organizations with 10 or more employees. The sample was stratified according to size and sector. Organizations from all sectors, except the agricultural industry, were sampled. The surveys were identical, but translated to each country's main language. The interview technique that was used in each country depended on what was perceived to be the best mode to address respondents in each particular country. The different methods were computer-assisted web interviewing (Denmark), paper and pencil interviewing (Germany, the Netherlands, and Sweden), and computer-assisted telephone interviewing (Italy and Poland). Total response rates were 11% (Germany), 17% (Italy), 23% (the Netherlands), 23% (Poland), 28% (Denmark), and 53% (Sweden), for a total number of 4910 responses. These response rates are in line with other large-scale employer surveys in organizational research (Baruch & Holtom, 2008). The surveys were completed by different types of organizational actors. For the current study, only surveys that were completed by the top manager (director, owner or CEO) were selected ($n = 1365$). This was not related to organizational size or sector, but was related to country. Surveys were completed by the top manager more frequently in Denmark, Germany, and the Netherlands (36-43%) than in Italy, Poland, and Sweden (10-18%). Managers that did not complete questions on their organizations' recruitment and retention practices, their age-based HR policies, or their retirement age norms ($n = 277$) were removed from the sample. Item nonresponse for the other variables in the current study was low ($< 1.5\%$) and random, which explains the minor differences between sample sizes for the different dependent variables. The remaining sample consists of 1088 observations. Because the dependent variables are dichotomous, we analyzed them with separate logistic regression models.

Measures

The wording of the variables used in this study is presented in Table 5.1. The top managers' age equality norms were computed as the average of three questions that were answered on a 5-point Likert scale (Cronbach's alpha = 0.66). The wording of these questions, the answer distribution and descriptives are presented in Table 5.2. The scores on the age equality norm scale run from 0 to 4, with low scores indicating a preference for younger workers, and high scores indicating support for age equality. The question on the top managers' retirement age norms was formulated in the same way as in the third wave of the European Social Survey (Radl, 2012). Organizational size is included in the analyses as the natural logarithm of the size reported by managers to aid interpretation and avoid problems with extreme outliers.

Results

Table 5.1 provides descriptive information on the variables used in the current study. With 26% of top managers indicating their organization encourages employees to keep working until normal retirement age, this is the most common practice related to employment of older workers. 17% of managers indicate their organization focuses their recruitment specifically on older workers, while 13% of manager indicate their organization encourages employees to work beyond normal retirement age or rehires retired former employees. Practices that focus on employment of older workers beyond normal retirement age are thus much less prevalent than practices that deal with older workers before the boundary of normal retirement age. This appears to be related to the mean top managers' retirement age norm of 67.21. While this is above the age of 65 that most countries have as normal retirement age, closer inspection of the distribution of this variable shows that 65 is the modal value and about 45% of respondents answered 65 or lower. Table 5.2 provides information about the composition of the age equality norms of managers. The average value of 2.28 indicates moderate support for age equality, but the distribution of scores suggests considerable variation in the support for age equality among top managers.

Table 5.3 provides results of the logistic regression analyses for the different forms of retention and recruitment of older workers. Overall, we see that top managers' norms with respect to age equality and retirement ages affect organizations' retention and recruitment practices regarding older workers, but in different ways. Model I shows that top managers' age equality norms affect their organizations' likelihood of recruiting older workers, so that when managers support age equality, organizations are more likely to recruit older workers. In addition, Model II shows that when managers support age equality, organizations are more

Table 5.1. Means, standard deviations, and wording of the study's variables.

	N	Mean or %	SD	Wording
Dependent variables				
Recruitment of older workers	1085	0.17	0.38	"Which of these recruitment or retention policies are used in your organization?" (0 = no; 1 = yes)
Retention until normal retirement age	1079	0.26	0.45	
Retention beyond normal retirement age	1080	0.13	0.34	
Rehiring retired former employees	1084	0.13	0.33	
Independent variables				
<i>Top managers' characteristics</i>				
Age equality norm	1076	2.28	0.78	Scale constructed of three variables (see Table 5.2) "At what age do you consider a person too old to work in your organization for 20h a week or more?"
Retirement age norm	1088	67.29	5.17	
Age	1087	49.93	8.69	
Female	1087	0.20	0.40	
<i>Age-based human resource policies</i>				
Training plans for older workers	1083	0.17	0.38	"Which of these policies are applied in your organization?"
Early retirement opportunities	1084	0.25	0.43	
Accommodation measures for older workers	1086	0.25	0.43	
Demotion	1084	0.07	0.26	
<i>Organizational characteristics</i>				
Sector	1078			"In which sector does your organization operate?" 18 answering categories recoded to three main sectors.
Public		31.91%		
Industry and construction		34.88%		
Services and trade		33.21%		
Organizational size	1077	679.13	15246.53	"How many employees are currently employed by your organization?"
Organizational size (logarithm)	1077	3.95	1.44	
Percentage older workers (aged 50+)	1073	23.82	16.60	"What percentage of your workforce consists of older workers?"
Recent recruitment problems	1082			"Has your organization recently faced difficulties finding employees?"
No		47.87%		
For some positions		42.79%		
For many positions		9.33%		
Country	1088			
Denmark		22.33%		
Germany		16.64%		
Italy		6.62%		
Poland		13.69%		
Sweden		6.80%		
The Netherlands		33.92%		

Table 5.2. Descriptive statistics of age equality norm scale (N = 1076)

	Strongly agree (0)	Agree (1)	Neutral (2)	Disagree (3)	Strongly disagree (4)	Mean	SD
One is better off investing in young employees than in older employees	5.81%	27.74%	22.76%	38.89%	4.79%	2.09	1.04
Older workers should step aside to give younger workers more career opportunities	3.32%	16.90%	16.90%	49.95%	12.93%	2.52	1.02
Younger workers should be preferred to stay over older workers in case of organizational downsizing	2.31%	24.63%	28.24%	38.33%	6.48%	2.22	0.97
Age equality norm						2.28	0.78

Note: Scale runs from 0 to 4; low scores indicate a preference for younger workers; high scores indicate support for age equality.

likely to encourage their older workers to work until normal retirement age. There is no significant effect of top managers' age equality norms on their organizations' likelihood of encouraging working beyond normal retirement age (Model III) or rehiring retired former employees (Model IV). The effects of top managers' age equality norms are illustrated in Figure 5.1, which shows predicted values of organizations' likelihood of recruiting older workers and encouraging working until normal retirement age against age equality norms of top managers. The lines show that organizations where top managers support age equality are far more likely to recruit older workers or encourage working until normal retirement age than organizations where top managers favor younger workers. Hypothesis 1 is thus partly supported.

With regard to the retirement age norms of top managers, Model III shows that when top managers have higher retirement age norms, their organizations are more likely to encourage employees to work beyond retirement age. Likewise, Model IV shows that higher retirement age norms of top managers are related to higher likelihoods of organizations rehiring retired former employees. Top managers' retirement age norms do not affect the recruitment of older workers before normal retirement age (Model I) or encouraging working until normal retirement age (Model II). The effects of top managers' retirement age norms are illustrated in Figure 5.2, which shows predicted values of organizations' likelihood of encouraging that their older workers work beyond normal retirement age and of rehiring retired former employees against the retirement age norms of top managers. The lines show that organizations where top managers hold high retirement age norms are much more likely to encourage working beyond normal retirement age or rehire retired former employees than organizations where top managers hold low retirement age norms. Hypothesis 2 is thus also partly supported.

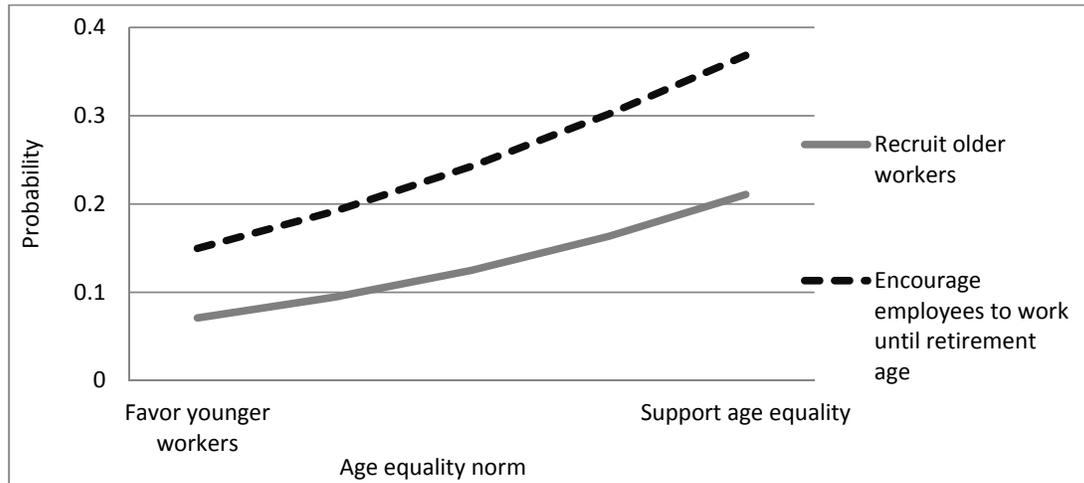
Table 5.3. Logistic regression models for the different forms of retention and recruitment of older workers, coefficients and standard errors.

Variable	Model I		Model II		Model III		Model IV	
	B	SE	B	SE	B	SE	B	SE
Intercept	-4.98 ***	1.34	-3.89 **	1.16	-8.33 ***	1.46	-9.56 ***	1.50
<i>Top managers' characteristics</i>								
Age equality norm	0.30 *	0.13	0.29 **	0.11	0.12	0.14	0.18	0.14
Retirement age norm	0.00	0.02	-0.01	0.02	0.06 **	0.02	0.05 *	0.02
Age	0.00	0.01	0.01	0.01	0.00	0.01	0.03 *	0.01
Female	0.21	0.24	0.05	0.20	-0.21	0.28	0.00	0.27
<i>Age-based human resource policies</i>								
Training plans for older workers	0.55 *	0.22	0.59 **	0.20	0.84 **	0.25	0.31	0.25
Early retirement opportunities	-0.01	0.23	-0.39	0.21	0.00	0.26	0.47	0.25
Accommodation measures for older workers	0.55 *	0.22	0.60 **	0.19	1.15 ***	0.23	0.81 **	0.25
Demotion	0.61 *	0.30	0.97 **	0.30	0.68 *	0.33	0.13	0.37
<i>Structural factors</i>								
Sector (ref. = Public)	0.09	0.23	0.07	0.20	0.55 *	0.27	0.47	0.27
Industry Services and trade	0.12	0.24	0.14	0.20	0.66 *	0.28	0.53	0.28
Size (log)	0.22 **	0.06	0.15 *	0.06	-0.01	0.08	0.05	0.08
Percentage older workers	0.01	0.01	0.01 *	0.00	0.02 *	0.01	0.02 **	0.01
Recent recruitment problems (ref. = No)	0.40 *	0.20	0.50 **	0.16	0.43 *	0.22	0.23	0.22
Many positions	0.72 *	0.31	-0.01	0.30	-0.05	0.42	0.60	0.37

Country (ref. = the Netherlands)	0.59	*	0.28	0.81	***	0.23	1.08	**	0.31	0.68	0.35
Denmark	1.39	***	0.28	0.63	*	0.26	0.88	*	0.37	1.65	***
Germany	-0.17		0.64	0.12		0.43	1.13	*	0.53	0.19	0.78
Italy	0.70	*	0.33	1.97	***	0.27	1.71	***	0.36	2.53	***
Poland	0.31		0.50	0.43		0.37	0.64		0.52	0.38	0.60
Sweden											
N		1022			1017			1017			1021
Log Likelihood		-402.72			-521.85			-335.45			-324.01
$\chi^2(19)$		130.37***			179.42***			125.54***			134.38***
McFadden's R ²		0.1393			0.1467			0.1576			0.1718

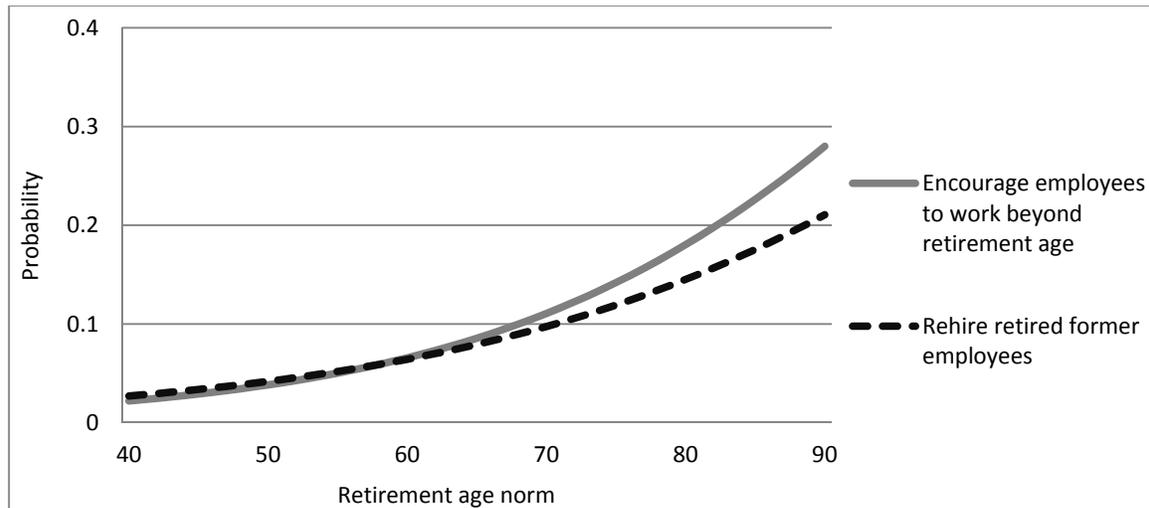
Note: * p < 0.05; ** p < 0.01; *** p < 0.001

Figure 5.1. Illustration of the effects of top managers' age equality norm on organizations' recruitment and retention of older workers before normal retirement age.



Note: Predicted values calculated with all other variables at their mean value.

Figure 5.2. Illustration of the effects of top managers' retirement age norm on organizations' recruitment and retention of older workers beyond normal retirement age.



Note: Predicted values calculated with all other variables at their mean value.

Further, the effects of age-based HR policies on recruitment and retention practices regarding older workers are generally positive. Training policies, accommodation policies and demotion for older workers are all associated with higher likelihoods of recruiting and retaining older workers (weakest effects for rehiring former employees). Offering early retirement opportunities does not affect recruitment or retention practices.

With regard to the structural factors, there are a few notable effects. Larger organizations are more likely to focus their attention on older workers before the boundary of normal retirement

age, but not after, whereas organizations with relatively more older workers are more likely to focus on employment after the boundary of normal retirement age, but not before. Further, we find that retention of employees up to and beyond retirement age is more likely in organizations with limited recruitment problems, but unexpectedly not in organizations with extensive recruitment problems. Finally, there are clear differences between organizations from the different countries in this study. Organizations from Denmark, Poland and Germany are overall much more likely to retain or recruit older workers than organizations from the Netherlands, Italy and Sweden.

We assessed the robustness of these findings with additional analyses that included interaction effects, in particular to check whether the effects of top managers' age-related workplace norms on their organizations' practices differed per country, due to different sample sizes and the rather strong effects of country dummies. The results showed one notable effect: The positive effect of age equality norms on recruiting older workers before retirement (Model I) is offset by a significant negative interaction effect in Germany, but not in the other countries. In other words, when top managers support age equality, their organizations are more likely to recruit older workers before retirement, but not in Germany. In all other models, the substantive results do not change, indicating the robustness of the results.

Discussion

In the current study, we studied how top managers' age-related workplace norms affect organizations' recruitment and retention practices regarding older workers. A key strength of this study is its consideration of multiple ways of recruiting and retaining older workers, and the focus on top managers and the way their norms shape organizational practices.

We found support for our hypotheses that age-related workplace norms of top managers affect organizations' recruitment and retention practices. However, age equality norms and retirement age norms affect different kinds of practices: Top managers' age equality norms only affect organizations' practices *before* the boundary of normal retirement age, whereas retirement age norms influence organizations' practices *after* the boundary of normal retirement age. In other words, top managers' norms regarding age equality affect whether their organization recruits older workers (before retirement age) and encourages employees to work until normal retirement age, while their norms about the retirement timing of older workers affect whether their organization retains workers beyond normal retirement age or recruits retirees. It is interesting that age equality norms do not affect practices *after* normal retirement age, and retirement age norms do not affect practices *before* normal retirement age. This suggests that employment of

older workers before and after normal retirement age are seen as distinct modes of employment. Apparently, support for age equality only applies to workers within the range of ‘normal working age’, which is usually defined from age 20 to 65. Employment of older workers after normal retirement age may be seen as something extraordinary and therefore not be affected by age equality norms.

The findings corroborate the general theoretical notion that norms are an important driver of behavior in the work domain (Settersten & Hagestad, 1996). It furthermore shows the importance of top managers in directing organizations’ practices, and thereby the importance of leadership in the emergence and effects of norms (e.g., Ostrom, 2000). Next to directing line managers’ selection behavior regarding older job applicants (Karpinska et al., 2013a; Oude Mulders et al., 2014), age-related workplace norms also influence organizations’ practices on a higher level. This may imply that age-related workplace norms of top managers ‘trickle down’ through the organization, affecting other people’s norms in the process, and thereby affecting organizations’ behavior. Top managers’ retirement age norms were found to be especially important in creating opportunities that are outside the institutionally created and publicly accepted norm of ‘normal retirement age’. Especially in Europe, where mandatory retirement at normal retirement age is prevalent and employment beyond normal retirement age is relatively uncommon, top managers’ dispositions towards older workers may be crucial in creating employment opportunities beyond the societally institutionalized norm of normal retirement age. Such norm breaking opportunities may only be possible when top managers are supportive of later retirement ages.

The effects of age-related workplace norms were found on top of the established effects of age-based HR policies, where organizations with HR policies specifically designed for older workers are also more active employers of older workers (e.g., Armstrong-Stassen, 2008a; Oude Mulders et al., 2015). Although not tested in the current study because of cross-sectional data limitations, this appears to be the result of a cyclical and continuous process, in which HR policies to manage older workers are implemented out of practical or strategic concerns (Rau & Adams, 2013), after which more older workers are attracted to the organization (Armstrong-Stassen, 2008b), which leads to more older workers in the organization and more active HR policies to deal with them (Van Dalen et al., 2015). This mechanism may be a fruitful endeavor of future research.

This study has some limitations that deserve attention. First, as mentioned above, the data are cross-sectional, which restricted our ability to test causal effects. Next to age-based HR policies being the result of continuous processes, age-related workplace norms may also change

as a result of organizational practices, demographic developments, and institutional changes at the macro level. One crucial question regarding age-related workplace norms is how stable they are over time and how they will develop in aging societies. Future studies could collect longitudinal data on workplace norms, organizations' age-based HR policies and employment practices regarding older workers to study the causal relationships.

Second, the dependent variables in this study offer limited information, in the sense that they inform us whether older workers are a specific target in recruitment or retention, but not what the *prevalence* of recruiting or retaining older workers is. Also, the dependent variables regarding encouraging retention of employees did not specify how exactly employees were encouraged to work longer and how many employees did prolong their careers. It cannot be ruled out that some organizations may have indicated to focus their recruitment and retention practices on older workers, but in reality end up recruiting or retaining few older workers, for example because they could not find qualified older workers or because other more attractive workers were eventually hired or retained. This limitation may be addressed by future studies by computing for example the percentage of older workers among newly hired employees as the dependent variable, by looking at retention rates of older workers around normal retirement age or by developing more detailed measures of how employers encourage longer working lives.

Third, the measures for age-related workplace norms were rather crude and could be improved in future studies. Age equality norms in the workplace, in particular, may be broader than conceptualized here. Future studies could improve this measure by including a broader array of items relating to age equality in the workplace, such as questions regarding the suitability of workers of different ages for certain positions and norms about promoting workers of different ages. Also, future studies should develop a measure that includes the possibility to indicate a preference for older workers. With regards to the retirement age norm, future studies could refine this measure by asking, for example, for norms about minimum and maximum ages at which employees should retire.

In conclusion, this study makes a novel contribution to the literature by specifically considering the important role that top managers play in guiding their organization and setting frameworks for employment decisions in the rest of the organization by studying the effects of their age-related workplace norms on organizations' recruitment and retention practices regarding older workers. The results show the importance of differentiating between employment *before* and *after* the boundary of normal retirement age, since different types of norms affect these practices. Changing age-related workplace norms may be conducive to better employment opportunities and a higher level of employment participation of older workers, but care should be taken to

target the right types of norms, since targeting different norms may yield different outcomes. Awareness campaigns could create more awareness about age discrimination, age equality, and qualities of older workers. In particular, more attention to culturally expected retirement timing and age equality is warranted, since age-related workplace norms are more directly related to employment behavior by organizations and managers than stereotypes of older workers (see also Karpinska et al., 2013a). Especially when it comes to stimulating employment outside the societal norm of ‘normal retirement age’, policy makers should try to change top managers’ norms about career duration and retirement timing.

Chapter 6

Discussion

Introduction

An increasing number of individuals are postponing their retirement and combining retirement with some form of employment. This is driven by government retirement-related policy changes in reaction to demographic developments that have led to population aging. In the Netherlands, opportunities for early exit from the labor force have been severely narrowed down, the eligibility age for the state pension is being gradually raised, and the employment of retirees is increasingly common (OECD, 2014).

Although research into determinants and consequences of retirement and employment behavior of older workers has received increasing attention in the scientific literature in recent years, the organization's perspective on the employment of retirees has received much less attention. This dissertation has addressed this gap in the literature by studying the overarching research question: *How do organizations and managers deal with the employment of older workers, in particular after retirement?* The answer to this research question is to be found in the empirical chapters of this dissertation, each of which has addressed a more specific research question. Because the empirical chapters were written as stand-alone journal articles, I will summarize and tie together the main results in this discussion chapter.

In this final chapter, I will first briefly summarize the main findings from the empirical chapters. Then, I will evaluate the research approach that was taken and suggest directions for future research. Next, I will discuss the societal implications of the research, followed by some brief concluding remarks.

Summary of results

Diversity in organizations' employment practices

With the observation that combining employment and retirement ("bridge employment") was increasingly prevalent, and that relatively little attention had been devoted to the demand side of the labor market regarding bridge employment, chapter 2 attempted to clarify some important questions regarding organizations and the employment of (early) retirees. In this chapter, I studied not only how common it was for organizations to employ (early) retirees, but also for what type of work (early) retirees were deployed within organizations, and whether they were paid like regular employees. The study was carried out among 998 Dutch organizations, which were surveyed in 2009 within the ASPA project.

Descriptive statistics showed that employment of (early) retirees was fairly common in Dutch organizations, with almost half of the surveyed organizations indicating that they occasionally (37%) or frequently (10%) employed (early) retirees. Organizations mostly deployed (early) retirees for regular work. Using (early) retirees for odd jobs (i.e., tasks that would otherwise be neglected) or on-call work was somewhat less common, and only a small minority deployed (early) retirees for work at irregular hours. About 86% of organizations that did employ (early) retirees also paid them a normal wage, where about 9% only offered a reimbursement of expenses and about 4% did not pay at all. Combined, this means that about one in seven organizations do not offer a normal wage to the (early) retirees they employ.

Next, the co-occurrence of organizations' practices regarding (early) retirees was studied with a latent class analysis, in order to construct a typology of the ways that organizations employ (early) retirees. The results revealed that four different types of organizations could be distinguished. The first class consisted of nonusers, the approximately 52% of organizations that do not employ (early) retirees at all. The second class (21% of organizations), users for mainly standard work, were organizations characterized by treating their (early) retirees mostly like regular employees, with high probabilities of deploying them for regular work and paying them a normal wage. The third class (10% of organizations), users for mainly nonstandard work, were more or less the opposite. They were relatively unlikely to deploy their (early) retirees for regular work, but likely to deploy them for odd jobs and on-call work. The relation between work and compensation was also diffuse, with only about 57% of organizations in this class paying a normal wage. The fourth and final class (17% of organizations), users for standard and nonstandard work, contains organizations that are fairly likely to employ (early) retirees, and relatively likely to deploy them for any type of work that arises. They are also highly likely to pay a normal wage.

Finally, a multinomial logistic regression analysis was performed to determine how organizations' application of age-based HR policies and other organizational characteristics were related to their employment of (early) retirees. Organizations that had age-based HR policies for regular staff in place were found to be more likely to employ (early) retirees for mainly regular work. By contrast, organizations that did not have such policies in place were more likely to not employ (early) retirees at all. Further notable results include that large organizations were more likely to employ (early) retirees for mainly standard work or for a combination of standard and nonstandard work, whereas small organizations were more likely to not employ (early) retirees, and that organizations with an older and more highly educated workforce were more likely to employ (early) retirees for standard work. Surprisingly, organizations that had difficulty finding

suitable personnel were less likely to employ (early) retirees, which indicates that employment of (early) retirees may not be seen as a way to solve short-term personnel deficiencies.

Rehiring older workers after mandatory retirement

Not only are more people working *until* the state pension age instead of taking early retirement, employment *after* state pension age is also increasingly prevalent. However, mandatory retirement of older workers may be impeding the employment of older workers past state pension age. In many European countries, including the Netherlands, mandatory retirement at the state pension age is commonly built into collective labor agreements and organizations' policies. When employees want to work beyond this age, they need to be formally rehired. In chapter 3, I studied which factors, at the employee- and employer-level, affected the decision of managers to rehire older workers after mandatory retirement. Different groups of factors were included, mainly guided by human capital theory and Lazear's (1979) notion of implicit contracts, with specific attention for ways in which employees themselves can affect their chances for reemployment by being flexible in their wage demands and contract preferences. The research question was studied with a vignette experiment among 443 Dutch managers from the LISS-panel in 2013.

In this vignette experiment, managers were asked to review fictional descriptions of older workers that wanted to continue working after mandatory retirement, after which they rated the likelihood that they would rehire the employee. Characteristics of the older worker, such as performance, health, and the amount of valuable social contacts, and the organizational labor market context were included in the description. Because the values of these characteristics were randomly combined, the effect of each characteristic on the manager's decision could be estimated reliably. The results of multilevel analyses showed that different types of factors influenced managers' decisions, but that in general managers' likelihood to rehire older workers after mandatory retirement was rather low. On average, managers were only moderately likely to rehire older workers after mandatory retirement, even when the employee had favorable individual characteristics. However, there was a lot of variation between managers, meaning that some are inherently more likely to consider rehiring older workers than others, who may never consider it.

Regarding the characteristics of employees that influence managers' decisions, the results showed that managers were most strongly influenced by factors related to the productivity potential of the employee, such as their performance until retirement, health status, and having a valuable social network. In addition, managers were influenced by the main motivation to work

of the employees, with them being more likely to rehire employees working for personal satisfaction or to transfer knowledge than those working mainly for financial reasons or to retain the social contacts at work. The employee's flexibility also affected managers' decisions, but only partly. Managers were more likely to rehire employees that were willing to accept a lower wage, but surprisingly, the extent of downward wage flexibility mattered less, suggesting that managers care more about the gesture of downward wage flexibility than the exact amount. Unexpectedly, managers were not influenced by the contract flexibility of employees, with employees with full-time, part-time, or on-call contract preferences equally likely to be rehired.

Also on the level of the organization and the manager, there were factors affecting the decisions of managers. First, in contrast to the results from chapter 2, here managers from organizations with recruitment problems are more likely to rehire older workers after mandatory retirement, especially if they have performed well until retirement. This may be related to the context: where this study was about managers rehiring former employees of the organization, this was not necessarily the case in chapter 2. Organizations and managers may see familiar, but not unfamiliar retirees as a temporary solution to recruitment problems. Further, managers with higher retirement age norms (i.e., they considered employees suitable to work at higher ages) were more likely to rehire older workers after mandatory retirement, illustrating the importance of considering managers' normative frameworks regarding the employment of older workers in their decision-making.

Inviting older job applicants to a job interview

As a contrast to studying managers' hiring decisions regarding mandatory retirees, chapter 4 considered managers' decision-making regarding non-retired older workers. With early retirement opportunities closed off, an increasing state pension age, and continued population aging, both the absolute amount and the relative share of older workers in the labor market is increasing. However, due to common stereotypes about older workers being less productive than younger workers, their labor market position is not particularly strong, which often results in long unemployment spells. In chapter 4, I studied which factors affected managers' decisions to invite older job applicants to a job interview, based on older workers' characteristics as they may appear in a résumé. In addition, I considered the effects of the general economic conditions, using two waves of data, and of changes in job demands within the organization on managers' decision-making. The study was carried out with data from a vignette experiment among 211 Dutch managers from the LISS-panel in 2013, complemented with data from a similar experiment in 2010. Between the two waves of data collection, the Dutch economy was in a persistent

recession, which created a natural experiment to consider the effects of the general economic conditions. The experimental procedure was similar to that of chapter 3, with managers being asked to read descriptions of older job applicants, and rating the likelihood of inviting them to a job interview.

The results showed that managers were overall not very inclined to invite older job applicants to a job interview, though employee's characteristics made a big difference. As expected, human capital-related characteristics of older workers, more specifically having the right qualifications, being in employment at another organization, and having relevant recommendations positively affected the likelihood that managers would invite them to a job interview. In addition, age of the job applicant played an important role, with applicants of 50 and 54 years old being more likely to be invited to a job interview than applicants of 58 and 62 years old. Even within the group of older workers, age is thus an important predictor of labor market success. With relevant human capital-related characteristics controlled for in this study, this suggests age discrimination may impede employment participation of older workers.

In addition to the characteristics of the job applicant, as expected, general economic conditions also affected managers' decisions, with older job applicants being more likely to be invited to a job interview in better economic conditions. This is most likely due to a labor supply effect: in bad economic conditions more people are unemployed and will apply to jobs, so relatively fewer of them will be invited to a job interview. In reality, the situation would most likely be exacerbated by a labor demand effect, with fewer job openings to apply to, though that was not part of this study. Finally, the results showed that an employee having a recommendation from an employer was especially valuable in bad economic times, perhaps because managers trust other employers to know what an organization needs in bad economic conditions. An employee's recommendation from an employee already working at the organization was especially valuable when job demands had increased, possibly because those employees already employed have experienced the increase in job demands themselves and are trusted to judge whether the job applicant can perform in those circumstances.

Top managers' norms and organizations practices

A key finding in the research literature regarding the prolonged employment of older workers, especially after some form of retirement, is that employers generally do not have formal policies regarding the employment of older workers, but make their decisions in an ad-hoc fashion (e.g., Hutchens & Grace-Martin, 2006; Vickerstaff, 2006a). This suggests that certain key organizational actors must take the lead to create opportunities for older workers. In chapter 5, I

therefore studied the role of top managers (i.e., directors, owners, or CEOs of organizations) in influencing their organizations' practices regarding the retention and recruitment of older workers before and after state pension age (in this chapter called 'normal retirement age').

The focus was on top managers' age-related workplace norms, more specifically their age equality norms (whether younger and older workers should be treated equally) and retirement age norms (when older workers are expected to retire), and their effect on organizations' practices. While social norms have featured prominently in sociological explanations of demographic behavior such as leaving the parental home and family formation, they are not so commonly used to study behavior in the work domain. However, because employment of older workers, especially after retirement, seemed so uncommon and unregulated from the literature, social norms regarding age equality and retirement age were considered relevant in understanding organizations' employment of older workers and retirees. The influence of age-related workplace norms, together with organizations' HR policies and structural characteristics, was studied for four different types of retention and recruitment behavior: recruitment of older workers before normal retirement age, encouraging older workers to work until and beyond normal retirement age, and rehiring retired former employees. The study was carried out in a European context, among 1088 organizations from six European countries. The data were collected in 2009 within the ASPA project.

Descriptive results showed that age-related workplace norms of top managers' were very varied, with some strongly supporting age equality, whereas others thought younger workers should be treated favorably on the labor market. In addition, some top managers thought employees should retire before age 60, while others thought employees were able to work beyond 80. The norm creating power of institutional rules was also clear, with the age of 65, which was the state pension age at the time, being the most common answer to the question when people should retire.

Logistic regression analyses indicated that top managers' age-related workplace norms were related to the organizational practices that were studied, but in different ways. Specifically, top managers' support for age equality positively influenced whether organizations focused their regular recruitment on older workers and encouraged their employees to work until normal retirement age. Top managers' support for later retirement ages, on the other hand, positively affected whether organizations encouraged their employees to work beyond normal retirement age and whether they rehired retired former employees. In other words, top managers' age equality norms affected organizations' practices *before* the boundary of normal retirement age, whereas top managers' retirement age norms affected organizations' practices *after* the boundary

of normal retirement age. This study corroborated the finding from chapter 3, which showed that retirement age norms mattered in managers' decision-making regarding employees returning to work after mandatory retirement, and extended this with the finding that age equality norms influence organizations' focus on pre-retirement older workers.

Next to age-related workplace norms of top managers, organizations' application of age-based HR policies and other characteristics also affected employment practices. Overall, organizations that applied more age-based HR policies were found to be more likely to recruit or retain older workers, both before and after normal retirement age. This corroborates and extends the findings from chapter 2, and shows that age-based HR policies are an important indicator of organizations' attitudes and behavior towards older workers. Further, an interesting finding was that organizations consider retaining their employees until and beyond normal retirement age as a suitable solution when their organization faces relatively minor recruitment problems, but not for major recruitment problems. Apparently, when there are major recruitment problems, attention is focused on solving these problems, while retaining older workers for a short time may not be considered as a structural solution. The mechanism of age-related workplace norms on employment practices was similar across countries, though organizations in Denmark, Germany, and Poland were overall more likely to recruit or retain older workers and retirees than organizations in Italy, Sweden, and the Netherlands.

Evaluation of approach and future research directions

The overarching aim of this dissertation was to study how employers deal with the employment of older workers, in particular after some form of retirement. In this section, I will discuss the scientific implications of the findings summarized before, in terms of the three guiding principles that characterized the approach of this dissertation. Based on that, I will discuss some directions for future research. To recall, these guiding principles were:

1. It is important to distinguish between the employment of older workers who have not formally retired and older workers that have retired in some form (e.g., early retirement, mandatory retirement).
2. It is important to consider theoretical insights from different social scientific disciplines to get a better understanding of organizations' and managers' behavior regarding older workers.
3. It is important to study and understand both the behavior of organizations and the behavior of individual managers that make employment decisions within organizations.

1. *Employment of older workers before and after retirement*

Distinguishing between the employment of older workers before retirement and older workers that have retired either partially or fully was the first guiding principle of this dissertation, and one that provided relevant insights. First, conceptually, many earlier studies among older workers have left the retirement status of older workers unspecified. Especially in countries where mandatory retirement is common and where people above a certain age receive a state pension, such as the Netherlands, this is problematic because employers in real life deal with different legal frameworks depending on the retirement status of the older worker. For example, in the Netherlands, all pre-retirement older workers are protected from unlawful dismissal, are paid at least minimum wage, and employers are partially responsible for paying pension, unemployment, and sickness benefits. This is usually not the case for older workers post-retirement, although the Dutch government has recently implemented a law to regulate employment of older workers past the state pension age (OECD, 2014). Specifying the retirement status of older workers in scientific studies, and studying older workers in different phases of retirement (e.g., partial retirement, early retirement, mandatory retirement) is thus important to draw implications for practice and policy and provides external validity.

Second, empirically, the findings in this dissertation show subtle but important differences regarding the employment of older workers before and after retirement. For example, in chapter 3, downward wage flexibility of older workers that want to continue working after mandatory retirement had a large positive effect on managers' likelihood to rehire them. This is an advantage for retirees with replacement income from a pension, because formal (re)negotiation is often not feasible for pre-retirement older workers due to labor laws and collective labor agreements. This is relevant because employers commonly perceive a large costs-productivity gap for older workers (Conen et al., 2012a) as a result from wages rising with seniority but productivity stagnating or declining with age. While these seniority wages are part of the implicit contract for pre-retirement older workers (Lazear, 1979), they can be renegotiated for older worker post-retirement, who also need less income from work because they receive additional pension benefits. On the other hand, post-retirement older workers are disadvantaged because they are usually older than pre-retirement older workers, and older workers are less likely to be hired (chapter 4).

The difference between older workers before and after retirement is most prominently observable in chapter 5, where it was shown that organizations are much more likely to support older workers working until state pension age than after state pension age. In addition, top managers' age equality norms influence organizations' practices regarding older workers *before*

state pension age, whereas their retirement age norms affect organizations' practices *after* this boundary. These findings suggest that age equality norms of managers in particular apply to workers within the range of 'normal working age', which is usually considered to start around age 20 and end at age 65. Employment beyond age 65 is for many top managers apparently still something extraordinary, and not affected by their support for age equality. On the other hand, when managers *do* consider older workers to be able to work beyond 65, this does not affect their views and practices regarding older workers *before* the age of 65. Overall, the findings corroborate the notion that high-level organizational actors such as top managers are important when it comes to initiating norm-breaking behavior or practices such as working beyond the state pension age. The results also confirm that distinguishing between the employment of older workers in different career phases is important, because employment before and after retirement are influenced by different types of factors.

2. Theoretical insights from different social scientific disciplines

Scientists from various social scientific disciplines have contributed to the literature on older workers, but generally earlier studies have focused on a restrictive set of explanatory variables from discipline-related theoretical frameworks, such as financial and human capital (economics), normative (sociological), or psychological factors to explain individual behavior or organizational practices. In this dissertation, I have combined factors from different theoretical frameworks. This multidisciplinary approach has proved to be fruitful, given the fact that many different types of factors (e.g., related to human capital, norms, or HR policies) affected organizations' and managers' behavior. Estimating the effects of these different types of factors simultaneously has the additional advantage of generating insights into the relative importance of the different factors.

Concepts derived from economics were important in guiding the research topic and design. Human capital-related factors, such as employees' qualifications and employment status, were – as hypothesized – strongly related to managers' hiring and job interview invitation decisions (chapters 3 and 4). Further, financial costs are naturally important for organizations and managers. In this dissertation, it was shown that managers also consider wage costs of older workers to be important, and that managers are more likely to rehire an older worker after mandatory retirement when he or she is willing to accept a significantly lower wage (chapter 3). However, these human capital-related characteristics and wage flexibility of employees only explained part of the variation in organizations' and managers' behavior.

The sociological concept of age-related workplace norms was also important in guiding research questions and approach of the studies. Social norms of hiring managers (chapter 3) and top managers (chapter 5) were found to be related to both individual decision-making of managers and organizational practices more broadly. The results from chapter 5 suggest that age-related workplace norms of top managers trickle-down and thereby also affect decision-making of lower level managers. Social norms, especially regarding older workers' retirement timing, proved to be particularly relevant when it came to the employment of older workers *after* state pension age, presumably because this falls outside of the boundaries of normal working age and thus needs specific support from important organizational actors.

Next to these main theoretical frameworks, concepts from other disciplines were also included and found to be relevant. For example, age-based HR policies of organizations are positively related to organizations being more active employers of older workers, both before and after retirement (chapters 2 and 5), and managers consider the social network and motivation of older workers (chapter 3) and the general economic conditions and job demands within their organization (chapter 4) in their employment decisions.

The results, where explanatory factors from a number of different social scientific disciplines play a role in explaining organizations' and managers' behavior, demonstrate the value of the multidisciplinary approach that was taken in this dissertation. Employment of older workers occurs in the economic sphere of life, and thus indicators of economic factors such as human capital or financial considerations should always have their place in labor market research, but because work is such a central aspect to human lives, indicators of personal considerations and social relations between individuals should also be considered to understand labor market behavior of humans and organizations.

3. Behavior of organizations and of managers within organizations

The third and final guiding principle of this dissertation stated that to better understand employment of older workers, both the behavior of the organization at the meso-level, and the behavior of individual managers at the micro level, should be studied. This principle has mainly guided the design of the empirical studies in this dissertation, with two studies featuring dependent variables at the organizational level (chapters 2 and 5), and two studies featuring dependent variables at the individual level (chapters 3 and 4). This principle has further guided the choice of independent variables, in such a way that the organization-manager link was present in the analyses. For example, the organizational context is present in the studies into managers' employment decisions, in the consideration of the labor market situation (chapter 3) and

organizational job demands (chapter 4), and individual age-related workplace norms of top managers are considered in the study of organizations' recruitment and retention behavior (chapter 5).

The results showed a high level of interaction between the behavior of managers and the practices observed at the organizational level. First, managers were affected by the organizational context in which they operated, with managers' rehiring of older workers after mandatory retirement much more likely when the organization faced recruitment problems (chapter 3). In addition, an increase in job demands within the organization did not directly affect managers' interview invitation decisions, but did make the recommendation of an employee for a job applicant more salient (chapter 4). Second, organizations' practices were affected by managers, most notably the top manager, who was shown to influence organizational frameworks for recruitment and retention with his or her age-related workplace norms (chapter 5).

The approach to split the focus of this dissertation between the behavior of organizations and the behavior of individual managers thus proved worthwhile. It should always be recognized that organizations are not independent entities, but are meso-level actors that are strongly influenced by the behavior of micro-level actors. Of course, organizations' behavior is not solely the aggregate of managers' behavior, since organizations have their own dynamics as well. In a similar vein, managers are always partly influenced by their organizational context and their individual dispositions.

Future research directions

With population aging projected to peak around the year 2040 (Van Duin & Stoeldraijer, 2014a), the upcoming decades will see an increase in older workers and the phenomena of postponing retirement and participating in employment after retirement. Research into the employment of older workers will thus stay relevant. Here, I will outline some directions for future research that would in my view add to the literature.

First, studying the effects of the changing governmental policies regarding retirement and employment of older workers is an interesting area of research. In the Netherlands, the state pension age is being raised gradually from 65 to 67, after which it will be connected to life expectancy projections (OECD, 2014). According to current projections, this means the state pension age will reach 71.1 years around 2060, which in turn means the number of people in the labor market will stay roughly stable between now and 2060, although the percentage of older workers in that group will increase until 2040 and then stabilize (Van Duin & Stoeldraijer, 2014a).

From a gerontological perspective, it is interesting to study whether people in different types of jobs will stay fit and motivated to work until such high ages.

From a social scientific perspective, it is interesting to study how social dynamics between generations will develop, and which role organizations will play in providing opportunities for employment for workers of different ages. One particularly interesting question in this area is how cultural age-related norms regarding work and retirement will develop in the upcoming decades. For example, will working until later ages become more acceptable and normatively expected of individuals as the state pension age increases, or will such normative expectations lag behind the policy changes? Will age-related workplace norms converge or diverge by lines of, for example, gender, educational level, or health status (Vickerstaff, 2010)? Additionally, it is interesting to study how age-related norms originate and whether they are mainly influenced by organizational or individual factors. Age-related workplace norms and how they influence organizations' practices are also suitable for a valuable innovation in organizational research, which would be to survey multiple organizational actors, such as line managers, HR managers, and top managers, per organization and thereby clarify the micro-meso link between managers' and organizations' behavior further. Such research can also clarify the role that organizations play in offering employment opportunities for workers of different ages.

From a policy perspective, the issue of mandatory retirement deserves special attention. Is mandatory retirement an obstacle for the employment of older workers, because they are forced to retire at a certain age after which they may be unlikely to be rehired, or does it help keep older workers in employment until state pension age by enforcing the implicit contract (Lazear, 1979), and should older workers that want to keep working after retirement take care of their own employability? This issue can for example be studied by comparing the Netherlands with the UK, where mandatory retirement was banned in 2011, or by comparing Dutch sectors that feature mandatory retirement with the national government, which does not enforce mandatory retirement at state pension age any longer.

Second, there are issues regarding the demand side of the labor market for older workers that deserve more attention, such as the employment of older workers in organizations in different sectors or industries and at different educational or professional levels. Adler and Hilber (2009) show that hiring rates of older workers differ by industry in the US, but it is unclear whether this is due to the nature of the work or due to other selection mechanisms. In this dissertation, sector was included in analyses of organizations' behavior, but was found to be unimportant for most employment practices. This may be due to the rather crude way of measuring organizational sector, but also due to the effects of gender, educational level and

organizational size being controlled for. The fact that vastly different types of organizations, in terms of goals, operations, and business strategies, may belong to the same sector or industry or that a single organization may operate at various professional levels was hardly accounted for. Future studies may clarify the role of sector or professional level by measuring organizational diversity in different and more detailed ways.

Third, the supply side of the labor market for older workers will change with more highly educated generations entering their 50s and 60s and as a result of social policy changes regarding retirement. In the Netherlands, working retirees have mainly been highly educated and intrinsically motivated older workers (Dingemans, 2016). Until now, due to the generosity of the Dutch pension system (Soede, 2012), working for mainly financial benefits has been rare. However, the level of pension benefits is under pressure, and increasing diversity in life courses and higher levels of self-employment (with often little or no pension accrual) may lead to more older workers seeking continued employment in the future for financial reasons (Dingemans, 2016). Results from chapter 3 indicate that employers are more inclined to (re)hire older workers that are intrinsically motivated than those that work mainly for financial reasons. Extrapolation of the current findings suggests a distinction between on the one hand older workers who need to work out of financial necessity but do not have the relevant human capital to stay employed, and on the other hand older workers that do not need to work financially, but want to work out of intrinsic motivation, who do possess relevant human capital and are therefore attractive to employers. Of course, the relation between older workers' motivation to work and employers' behavior may change in the future as working until and beyond state pension age becomes more common and the group older workers looking for work beyond retirement increases. Future studies should acknowledge the heterogeneity of the group of older workers (Vickerstaff, 2010), and study how their diversity may influence employers' behavior.

Societal implications

With continuing trends towards an older society, a higher level of labor participation of older workers, and later retirement, the results from this dissertation help shed some light on employers' behavior towards older workers, now and in the future. From a societal perspective, it is very difficult to predict how supply and demand of labor will develop in the future. On the one hand, continued population aging and economic recovery after recent crises may lead to a tight labor market and shortages of skills and talent, which would lead to a growing demand for retired workers and thus increasing opportunities for older workers that want to work past retirement (Dychtwald et al., 2006; Maestas & Zissimopoulos, 2010). On the other hand, economic relapse

and political crises due to for example large-scale immigration into Western countries may lead to a slack labor market in which unemployment levels are high, demand for labor is low and employment of older workers past retirement is unlikely. Another development that may curb the demand for labor of older workers is the trend towards automation and replacement of mainly low and medium-skilled workers by robots. For example, Frey and Osborne (2013) estimated that 47% of jobs in the US are susceptible to computerization. If such trends continue, based on the findings in this dissertation, it will be very unlikely that employers find it necessary or valuable to employ older workers past their retirement, except for perhaps a small proportion of highly skilled and highly talented employees. To limit inequality growth in such a scenario, some commenters have called for the introduction of a basic income, which would provide individuals with enough income to live off (e.g., Standing, 2011; Skidelsky & Skidelsky, 2012).

In the Netherlands, there has been a large public debate about raising the state pension age, which has continued even after the policy reform was passed in 2012 due to high unemployment rates, especially among older workers. Unemployed older workers in the Netherlands, especially after age 55, are highly unlikely to find reemployment (De Graaf-Zijl et al., 2015; Statistics Netherlands, 2012), which leads to long-term unemployment, whereas employed older workers need to work longer before they receive their state pension. In addition to raising the state pension age, the Dutch government also recently passed a law that reduces the barriers for employers to employ workers past state pension age. For example, the law reduces employers' obligations for paid sick leave from two years to six weeks for workers over the state pension age. These policy changes aim to facilitate and increase employment among older workers, but the Dutch Council of State has warned for the risk of displacement of non-retired older workers, who may be more dependent on income from employment than older workers who receive pension benefits (Raad van State, 2014). Although the Dutch government has included conditions that aim to prevent long-term displacement of pre-retirement older workers, it seems unavoidable that some displacement effects will take place, because older workers that continue working after retirement are cheaper for employers and enjoy a lower level of employment protection than older workers before state pension age. Displacement is a complex issue and more research is needed to answer the question how large such effects are and whose employment may be obstructed by people working after state pension age.

This dissertation shows that many organizations are in principle open to employing older workers, also after state pension age, but only if such older workers have a clear added value to the organization. In addition, age-related workplace norms play an important role, and the institutional context of retirement (e.g., fixed state pension age and mandatory retirement) in the

Netherlands may impede employment of those older workers that want to continue working. However, the Dutch institutional context with relatively high levels of employment protection legislation and mandatory retirement also helps enforce the implicit contract (Lazear, 1979), and may thus contribute to older workers being able to work until state pension age instead of facing layoffs or being employed in low-quality part-time jobs as is common in countries such as the US and the UK (Kalleberg, 2011; Lain, 2012). From a societal perspective, trying to facilitate the employment of older workers that want to work beyond state pension age is in itself something worth pursuing, but we should be careful not to make employment after retirement a goal that obstructs employment of other workers.

For organizations, the research in this dissertation may provide insights into how others deal with the employment of older workers and retirees. Many employers use (early) retirees in their organization for regular work, but work for odd jobs and using (early) retirees for on-call work are also common. The application of HR policies that are specifically aimed at older workers often goes hand in hand with higher employment rates of older workers. With the continued aging of the workforce, investments into the employability of older workers of now and of the future will be necessary to ensure productivity and organizational continuity. Employers need to be aware of the age-related workplace norms of their top managers, but also of other actors within their organization, because such norms may affect their practices in an unexpected way, and a supportive normative climate may help older workers to be more productive and realize their preferences. Now that employment of older workers past traditional retirement ages is becoming increasingly prevalent, it may be fruitful for organizations to develop consistent and unbiased policies and practices to deal with this issue, as opposed to the current practice of taking ad-hoc decisions. Developing policies on the demotion of older workers but also on offering them opportunities for flexible employment arrangements and gradual retirement, possibly within the context of sectoral collective labor agreements and in consultation with employers' and employees' representative groups, are also important topics in this respect.

Finally, individuals that wish to work beyond their retirement, or retire gradually and thereby combine employment and retirement, can learn that their human capital is their most important asset, and therefore it is worthwhile to invest in updating skills and developing talents over the course of their career (Damman, 2014). In addition, they have the opportunity to influence organizations' decisions by making clear they are willing to accept a lower wage, but also need to consider the organizational context and realize some organizations are not willing or do not have the capacity to (re)hire them. Now that government subsidized early retirement is no longer possible and pension accrual is lower than before, individual responsibility to shape one's own

career and save for retirement is growing. Taking responsibility and investing in updating human capital is key for individuals to realize their own preferences regarding employment at older ages and retirement.

Concluding remarks

Employment of older workers after retirement is increasingly common now that the 'early retirement culture' has been reversed and people are retiring both later and more gradually. This dissertation has shown that from the employer's perspective, a lot of variation exists in the employment of older workers after retirement. There is large diversity in the normative views of employers regarding the suitability of older workers for employment past traditional retirement ages, which determines for an important part whether the organization is open to employment past retirement at all. In addition, there is variation in the ways in which employers use retirees in their organizations, with some considering them to be similar to 'regular' employees, while others treat them as flexible employees that can be called upon when needed. As the population ages further, the prevalence of employment of older workers after retirement is projected to increase. Increased attention from social scientists and policy makers is necessary to facilitate this while ensuring it does not go at the expense of other groups of workers.

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Nederlandse samenvatting (summary in Dutch)

Organisaties, managers, en het doorwerken van oudere werknemers na pensioen

Als gevolg van een vergrijzende bevolking is het aandeel oudere werknemers op de arbeidsmarkt sterk gestegen in de afgelopen decennia, zowel in Nederland als in andere ontwikkelde landen. In reactie op deze demografische ontwikkeling heeft de Nederlandse overheid de wet- en regelgeving rondom pensionering veranderd, in een poging de arbeidsparticipatie van ouderen te verhogen en zo het stelsel van sociale zekerheid betaalbaar te houden. Zo is onder meer vervroegde uittrekking (VUT) afgeschaft en wordt de AOW-leeftijd geleidelijk verhoogd van 65 jaar naar 67 jaar – waarna hij wordt gekoppeld aan de verder stijgende levensverwachting. Het is echter niet alleen aan oudere werknemers zelf om te bepalen tot welke leeftijd zij doorwerken, getuige bijvoorbeeld de hoge onvrijwillige en langdurige werkloosheid onder oudere bevolkingsgroepen. Werkgevers scheppen met hun beleid en gedrag de mogelijkheden voor ouderen om al dan niet door te werken tot of zelfs na de verhoogde AOW-leeftijd. De rol van werkgevers op de arbeidsmarkt voor oudere werknemers, met name wat betreft het doorwerken na pensioen, heeft echter tot dusver relatief weinig aandacht gekregen in de wetenschappelijke literatuur. In dit proefschrift wordt dieper ingegaan op de vraag op welke manieren werkgevers (organisaties en managers) omgaan met het doorwerken van oudere werknemers, in het bijzonder in de periode na pensioen.

Een beter begrip van het gedrag van organisaties en managers omtrent langer doorwerken van oudere werknemers is om meerdere redenen van belang. Allereerst voor de samenleving als geheel. Doorwerken tot op hoge leeftijd is vanuit het perspectief van de samenleving waardevol, omdat werkenden meer belasting betalen dan gepensioneerden, en omdat werkende ouderen voor de AOW-leeftijd minder beroep doen op sociale zekerheid dan vroegtijdig gepensioneerden. Nu ouderen worden gestimuleerd om langer door te werken is het belangrijk om ook te begrijpen hoe werkgevers tot hun gedrag komen. Langer doorwerken van ouderen kan een positief effect hebben omdat het gezond en actief ouder worden stimuleert. Echter, wanneer ouderen langer doorwerken kan het ook tot gevolg hebben dat andere werknemers van de arbeidsmarkt worden verdrongen. Meer inzicht in de motieven en het gedrag van werkgevers kan helpen dit soort processen beter te begrijpen.

Op de tweede plaats kunnen werkgevers zelf profiteren. Veel organisaties hebben te maken met een vergrijzend personeelsbestand en zullen derhalve meer aandacht moeten besteden aan leeftijdsbewust personeelsbeleid om de productiviteit en continuïteit van de organisatie te

waarborgen. Ook al zijn de arbeidstekorten die voor de economische crisis van 2008 werden voorspeld grotendeels uitgebleven, toch kunnen deze in specifieke sectoren in de toekomst alsnog optreden, als gevolg van grote groepen uittredende ouderen en weinig instromende jongeren. Wanneer werkgevers zelf beter inzicht hebben in hun gedrag omtrent langer doorwerken, en begrijpen hoe zij aantrekkelijk kunnen zijn voor oudere werknemers, dan zijn zij beter toegerust om in de toekomst goed om te gaan met ouderen die ook na hun pensioen zouden willen blijven werken.

Ten derde kunnen de inzichten nuttig zijn voor de oudere werknemers van nu en de toekomst. Steeds meer ouderen zijn bereid om tot op hogere leeftijd op enigerlei wijze actief te blijven op de arbeidsmarkt. Toch lukt het veel oudere werknemers niet hun voorkeuren met betrekking tot werken en pensioen volledig te realiseren, bijvoorbeeld omdat zij geen (parttime) werk kunnen vinden en zo onvrijwillig werkloos zijn. Een beter inzicht in de manieren waarop werkgevers omgaan met oudere werknemers kan er voor zorgen dat oudere werknemers zich meer bewust zijn van de eigenschappen die hen aantrekkelijk maken voor werkgevers, en zo op termijn meer succes hebben bij het realiseren van hun voorkeuren omtrent werken en pensioen.

Aanpak en methodologie

Op welke manieren werkgevers omgaan met het doorwerken van oudere werknemers is in dit proefschrift onderzocht in vier empirische artikelen, elk met zijn eigen meer concrete onderzoeksvraag en aanpak. Bij het ontwerpen van de deelstudies en het opzetten van het promotieonderzoek als geheel zijn de volgende principes leidend geweest:

1. Het is van belang onderscheid te maken tussen oudere werknemers die nog niet gepensioneerd zijn en oudere werknemers die wel gepensioneerd zijn (bijvoorbeeld door deeltijdpensioen of verplicht pensioen).
2. Het is belangrijk theoretische inzichten van verschillende sociaalwetenschappelijke disciplines te gebruiken om het gedrag van organisaties en managers beter te begrijpen.
3. Het is van belang om zowel het gedrag van organisaties als geheel als het gedrag van individuele managers die beslissingen nemen over oudere werknemers te bestuderen.

Twee verschillende databronnen zijn gebruikt om het gedrag van organisaties en managers naar oudere werknemers te onderzoeken. Ten eerste, om het gedrag van organisaties als geheel te onderzoeken is gebruik gemaakt van data uit een enquête die in Nederland en enkele andere Europese landen is gehouden in 2009. Enquêtes hebben als voordeel dat er relatief snel en

gemakkelijk uniforme data kan worden verzameld van een grote groep respondenten. De data die hier worden gebruikt zijn door verschillende organisatieactoren ingevuld (bijvoorbeeld door de directeur, een manager of het hoofd personeelszaken) maar gaan hoofdzakelijk over wat er zich op organisatieniveau afspeelt. Deze data zijn daardoor geschikt om vragen mee te beantwoorden die ook op organisatieniveau spelen.

Daarnaast zijn er data verzameld met de vignettemethode, om het gedrag van individuele managers die een beslissing moeten nemen over een oudere werknemer in een bepaalde context te onderzoeken. De vignettemethode is een quasi-experimentele methode die als doel heeft het ontrafelen van beslissingen of beoordelingen in bepaalde contexten. Respondenten in een vignetteonderzoek krijgen een (fictieve, maar reëel mogelijke) beschrijving van een situatie waarover zij een beslissing moeten nemen. De details van de beschrijving (bijvoorbeeld de kenmerken van een oudere werkzoekende) worden daarin steeds gemanipuleerd, zodat inzichtelijk wordt in welke mate de verschillende details de beslissing van de respondent het meest beïnvloeden. De vignettegegevens die in het kader van dit proefschrift werden verzameld in 2013 (deels aangevuld met vergelijkbare data uit 2010) zijn afkomstig van managers die in hun dagelijkse leven beslissingen nemen met betrekking tot oudere werknemers. Deze data zijn daardoor geschikt om onderzoeksvragen met betrekking tot het gedrag van individuele managers mee te beantwoorden.

Diversiteit in de omgang van organisaties met werkende gepensioneerden

In hoofdstuk 2 is onderzocht op welke verschillende manieren Nederlandse organisaties gepensioneerden in dienst hebben en op welke manieren die verschillen verklaard kunnen worden. Er is niet alleen gekeken of organisaties gepensioneerden in dienst hebben, maar ook voor welke soorten werk zij worden ingezet, en of zij betaald krijgen zoals niet-gepensioneerde werknemers. Vervolgens is onderzocht of organisaties kunnen worden gecategoriseerd op basis van hun omgang met gepensioneerden, en welke organisatiekenmerken de omgang met gepensioneerden beïnvloeden.

Uit de resultaten bleek dat ongeveer de helft van de ondervraagde organisaties op dat moment of in het recente verleden weleens gepensioneerden in dienst had gehad. In 80% van de organisaties die weleens een gepensioneerde in dienst hadden werden zij ingezet voor regulier werk. Gepensioneerden inzetten voor specifieke klussen of als oproepkracht gebeurde minder vaak, maar alsnog in meer dan 50% van de organisaties die gepensioneerden in dienst hadden. Een zeer kleine minderheid zette gepensioneerden weleens in voor werk op incurante tijden. De meeste organisaties leken gepensioneerden grotendeels hetzelfde te behandelen als regulier

personeel. In 86% van de organisaties werden zij dan ook op hetzelfde niveau als niet-gepensioneerden betaald. 9% van de organisaties betaalde slechts een onkostenvergoeding en 4% van de organisaties betaalde de gepensioneerden niet.

Vervolgens werden werkgevers door middel van een latente klassenanalyse gecategoriseerd op basis van hun omgang met gepensioneerden. Op deze manier werden vier verschillende typen organisaties onderscheiden. Ten eerste waren dit de ‘niet-gebruikers’; de 53% van de organisaties die geen gepensioneerden in dienst had. Ten tweede waren dat de ‘gebruikers voor regulier werk’. Dit waren de 20% van de organisaties die hun gepensioneerden het meest als reguliere werknemers behandelden door hen in te zetten voor regulier werk en hen volledige betaling te bieden. Ten derde waren dit de ‘gebruikers voor irregulier werk’; de 11% van de organisaties die gepensioneerden voornamelijk inzetten voor specifieke klussen en als oproepkracht. Opvallend was dat slechts 57% van de organisaties in deze groep normale betaling bood, terwijl 43% slechts een onkostenvergoeding of niets betaalde. Ten vierde waren het de ‘gebruikers voor regulier en irregulier werk’, de 16% van de werkgevers die het vaakst gepensioneerden in dienst hebben, en hen inzetten voor een combinatie van regulier en irregulier werk. In de meeste gevallen worden gepensioneerden in deze organisaties gewoon betaald.

Vervolgens werd onderzocht welke organisatiekenmerken invloed hadden op de omgang met gepensioneerden. De resultaten lieten zien dat organisaties die meer leeftijdsbewust personeelsbeleid voerden (zoals vervroegd pensioen aantrekkelijk maken of flexibele uren toestaan, maar ook demotie) vaker gepensioneerden in dienst hadden en hen inzetten voor regulier werk. Organisaties die geen of weinig leeftijdsbewust personeelsbeleid voerden hadden doorgaans geen gepensioneerden in dienst. Verder hadden grote organisaties en organisaties met een ouder en hoger opgeleid personeelsbestand vaker gepensioneerden in dienst dan kleine organisaties en organisaties met een jonger en lager opgeleid personeelsbestand. Een verrassende bevinding was dat organisaties die moeite hebben met het vinden van geschikt personeel meestal geen gepensioneerden in dienst hadden. Kennelijk worden gepensioneerden door die organisaties niet gezien als oplossing voor een tekort aan personeel.

Herintreding na verplicht pensioen

In hoofdstuk 3 is onderzocht in welke mate managers geneigd zijn om oudere werknemers opnieuw in dienst te nemen na hun verplichte pensioen. Een verplichte pensioenleeftijd lijkt op het eerste gezicht strijdig met de noodzaak om langer door te werken, maar is theoretisch verklaarbaar. Omdat lonen doorgaans stijgen tijdens een dienstverband verdienen ouderen volgens de economische theorie meer dan hun productiviteit van het moment op zichzelf zou

rechtvaardigen, als compensatie voor hun jongere jaren, wanneer ze minder verdienen dan door hun productiviteit gerechtvaardigd wordt geacht. Dit systeem functioneert echter alleen met een redelijke mate van ontslagbescherming en een verplichte pensioenleeftijd, omdat ouderen anders onredelijk lang zouden kunnen profiteren van hoge lonen. Evenwel zijn werkgevers en werknemers vrij om na het verplichte pensioen van een oudere werknemer een nieuwe arbeidsrelatie aan te gaan. In dit hoofdstuk werd met een vignetteonderzoek onderzocht welke kenmerken van managers en van de oudere werknemer invloed hebben op de beslissing van de manager om een nieuwe verbintenis te accepteren. Managers lazen een fictieve beschrijving van een oudere werknemer uit hun eigen organisatie die recent met verplicht pensioen was gegaan en de wens had geuit om nog een tijd door te werken. De kenmerken van de oudere werknemer werden in verschillende willekeurige combinaties aan de managers voorgelegd, zodat de effecten van deze kenmerken op de beslissingen van managers konden worden onderzocht.

Uit de resultaten blijkt dat managers doorgaans niet erg geneigd zijn om in te gaan op het verzoek tot langer doorwerken van een oudere werknemer die met verplicht pensioen is gegaan. Zelfs wanneer een oudere werknemer alle kenmerken meeheeft lijken sommige managers principieel een nieuw dienstverband niet te willen overwegen. Toch zijn er grote verschillen tussen managers en hebben zoals verwacht de kenmerken van oudere werknemers een belangrijke invloed op de beslissingen van managers. De meeste aandacht van managers gaat uit naar de waarde van de werknemer voor de organisatie en zijn of haar potentiële productiviteit, zoals zijn of haar functioneren, gezondheid en de hoeveelheid sociale contacten. Indien bekend heeft de motivatie van werknemers om door te willen werken ook een effect op de beslissingen van managers, waarbij werknemers die hoofdzakelijk werken voor hun persoonlijke voldoening of voor het overdragen van kennis meer kans hebben op een nieuw dienstverband dan werknemers die hoofdzakelijk werken voor de financiële vergoeding of voor het behoud van sociale contacten. Oudere werknemers kunnen zelf hun kans op een nieuw dienstverband nog verhogen door de bereidheid tot een loonoffer te tonen. Verrassend genoeg heeft de bereidheid tot flexibele inzetbaarheid echter geen effect op de beslissingen van managers.

Ook de kenmerken van de manager en van de organisatie kunnen de kans op een nieuw dienstverband beïnvloeden. In tegenstelling tot de bevindingen in het vorige hoofdstuk zijn managers uit organisaties die moeite hebben met het vinden van geschikt personeel hier meer geneigd om oudere werknemers na verplicht pensioen in dienst te nemen. Dit kan te maken hebben met de specifieke context van deze studie, waarbij per definitie sprake was van een bekende oud-werknemer van de organisatie, wat niet per se het geval was in hoofdstuk 2. Bij bekende oud-werknemers is het risico lager; wellicht worden zij daarom wel geschikt bevonden

wanneer men moeite heeft geschikt personeel te vinden. Ten slotte zijn de leeftijdsnormen van managers met betrekking tot pensioen (wanneer zij vinden dat werknemers met pensioen horen te gaan) van invloed op hun beslissing, waarbij managers die voor een hogere pensioenleeftijd zijn meer geneigd zijn oud-werknemers na verplicht pensioen opnieuw in dienst te nemen.

Selectie van oudere sollicitanten voor een sollicitatiegesprek

In hoofdstuk 4 lag de focus op niet-gepensioneerde oudere sollicitanten, waarover een manager op basis van enkele eigenschappen van de sollicitant moest beslissen of de sollicitant uitgenodigd werd voor een sollicitatiegesprek. Oudere werknemers die nog niet met pensioen kunnen, hebben als zij hun baan verliezen vaak een slechte positie op de arbeidsmarkt, getuige de hoge langdurige werkloosheid onder ouderen. Daarom werd hier onderzocht welke eigenschappen van oudere werkzoekenden van invloed zijn op de beslissingen van managers om hen al dan niet uit te nodigen voor een sollicitatiegesprek. Daarnaast werden in dit onderzoek de effecten van veranderende algehele economische omstandigheden en taakeisen binnen de organisatie op de beslissingen van managers gemeten door gebruik te maken van data van twee identieke vignette-experimenten, uit 2010 en 2013. Tussen de twee meetmomenten was de Nederlandse economie grotendeels in recessie. Dit bood een unieke kans om de invloed van zulke economische omstandigheden op het arbeidsmarktsucces van ouderen te onderzoeken.

Uit de resultaten blijkt dat managers door de bank genomen weinig geneigd zijn om oudere sollicitanten uit te nodigen voor een sollicitatiegesprek, al kunnen de eigenschappen van de sollicitant wel het nodige verschil maken. Zoals verwacht spelen met name productiviteitsindicatoren van de oudere sollicitant een rol in de beslissing van de manager. De juiste kwalificaties, solliciteren vanuit een andere baan (in tegenstelling tot solliciteren vanuit werkloosheid) en een aanbeveling van een vorige werkgever of een werknemer van het bedrijf zelf komen de kansen van een oudere sollicitant fors ten goede. Daarnaast speelt ook de leeftijd van de sollicitant een belangrijke rol, waarbij sollicitanten van 50 of 54 jaar een veel grotere kans hadden op een sollicitatiegesprek dan sollicitanten van 58 of 62 jaar. Ook binnen de groep oudere werkzoekenden speelt leeftijdsdiscriminatie dus een significante rol, die mogelijk arbeidsparticipatie van competente oudere werknemers in de weg staat.

Naast de verwachte effecten van de eigenschappen van werknemers op de beslissingen van managers speelden ook de economische en organisatorische context een rol. Allereerst was er een negatief hoofdeffect van een slechtere economische situatie. Met andere woorden, oudere sollicitanten hebben een lagere kans om te worden uitgenodigd voor een sollicitatiegesprek in slechte economische tijden. Omdat er in slechtere tijden meer sollicitanten zijn (en minder

vacatures) hebben oudere sollicitanten het vermoedelijk nog moeilijker dan in betere economische tijden. Ten slotte lieten de resultaten zien dat een oudere sollicitant met een aanbeveling van een andere werkgever daar meer profijt van had in slechte economische omstandigheden, terwijl oudere sollicitanten met een aanbeveling van een medewerker van het bedrijf waar men solliciteerde daar meer profijt van hadden wanneer de taakeisen in de organisatie waren toegenomen. Vermoedelijk komt dit doordat managers in stressvolle situaties (in slechte economische omstandigheden of wanneer taakeisen zijn toegenomen) meer vertrouwen op de aanbevelingen van betrouwbare figuren die hun reputatie op het spel zetten met een dergelijke aanbeveling.

Normen van topmanagers en gedrag van organisaties

In hoofdstuk 5 is onderzocht welke rol topmanagers (d.w.z., directeuren, eigenaren, CEO's) spelen in het bepalen of beïnvloeden van de praktijken van hun organisaties met betrekking tot het behouden en recruterend van oudere werknemers. Voor dit onderzoek werden uit een grootschalige Europese enquête alleen de respondenten geselecteerd die als topmanager binnen hun organisatie opereerden. Speciale aandacht was er voor de rol van leeftijdsgerelateerde normen van topmanagers, meer specifiek hun normen ten aanzien van leeftijdsneutrale behandeling van werknemers en leeftijdsnormen ten aanzien van pensioen (wanneer men vindt dat anderen gemiddeld genomen met pensioen horen te gaan). Omdat de focus op langer doorwerken (tot en na de AOW-leeftijd) een relatief nieuw fenomeen is, werd verwacht dat dergelijke normen van sturende personen een aanmerkelijke rol zouden spelen in het gedrag dat wordt waargenomen op organisatieniveau. Er werd gekeken naar vier soorten organisatiegedrag, te weten recrutering van ouderen voor de AOW-leeftijd, stimuleren van doorwerken tot de AOW-leeftijd, stimuleren van doorwerken tot voorbij de AOW-leeftijd, en het recruterend van gepensioneerd. De data waren afkomstig van ruim duizend topmanagers uit zes Europese landen (Denemarken, Duitsland, Italië, Nederland, Polen en Zweden).

De resultaten laten zien dat de leeftijdsnormen van topmanagers inderdaad invloed hebben op de organisatiepraktijken, maar met verschillende effecten per norm. Wanneer de topmanager een grotere voorstander is van leeftijdsneutrale behandeling van alle werknemers dan is de organisatie meer geneigd ouderen (voor pensioen) te recruterend en haar eigen medewerkers te stimulerend om door te werken tot de AOW-leeftijd. Daarnaast, wanneer managers een hogere leeftijdsnorm hadden ten aanzien van pensioen (d.w.z., zij vonden dat anderen gemiddeld genomen later met pensioen kunnen) had dit een positief effect op het stimulerend van werken tot voorbij de AOW-leeftijd en het recruterend van gepensioneerd. Met andere woorden, de steun

voor leeftijdsneutrale behandeling beïnvloedde organisatiepraktijken met betrekking tot ouderen *voor* de AOW-leeftijd, en de leeftijdsnorm ten aanzien van pensioen beïnvloedde organisatiepraktijken met betrekking tot ouderen *na* de AOW-leeftijd. Een interessante bevinding is dat de normen elk verschillende soorten organisatiepraktijken beïnvloeden, en elkaar dus meer aanvullen dan dat er overlap is.

Naast de leeftijdsgerelateerde normen van werkgevers waren ook andere factoren van belang. Net als in hoofdstuk 2 waren organisaties die meer leeftijdsbewust personeelsbeleid voerden meer geneigd ouderen te behouden danwel te recruteren dan organisaties zonder leeftijdsbewust personeelsbeleid. Let wel dat hier niet per se sprake is van een oorzakelijk verband; vermoedelijk is leeftijdsbewust personeelsbeleid een redelijke indicator voor de manier waarop organisaties met ouderen omgaan. Een opvallend resultaat was dat organisaties met milde personele problemen (bijvoorbeeld het vinden van geschikt personeel) meer geneigd zijn ouderen tot na de pensioenleeftijd te behouden, maar dat dit niet opgaat voor organisaties met meer substantiële personele problemen. Waarschijnlijk worden gepensioneerden wel gebruikt om relatief kleine personele problemen op te lossen, maar gaat bij meer serieuze personele problemen alle aandacht uit naar het binnenhalen van niet-gepensioneerden en verjonging. De gevonden effecten waren vrijwel identiek in de onderzochte landen, al bleken organisaties uit Denemarken, Duitsland en Polen over het geheel genomen veel meer geneigd om ouderen te behouden of te recruteren dan organisaties uit Italië, Nederland en Zweden.

Conclusie en discussie

Het doel van dit proefschrift was om het gedrag van werkgevers – zowel van organisaties als van individuele managers – omtrent het doorwerken van oudere werknemers, in het bijzonder in de periode na pensioen, beter te begrijpen. De gekozen aanpak, met vier empirische artikelen die zijn opgezet aan de hand van enkele leidende principes, heeft tot een beter begrip van zowel organisaties als managers geleid, al blijven er ook genoeg vragen open voor toekomstig onderzoek. In deze laatste paragraaf zullen de belangrijkste resultaten van de empirische artikelen met elkaar worden verbonden, en worden suggesties voor toekomstig onderzoek en maatschappelijke implicaties besproken.

De resultaten uit de vier empirische hoofdstukken tonen aan dat de drie principes aan de hand waarvan dit proefschrift werd opgezet nuttig zijn geweest. Ten eerste werd expliciet onderscheid gemaakt tussen gepensioneerde en niet-gepensioneerde oudere werknemers. Dit was conceptueel van belang vanwege verschillen in regelgeving omtrent het dienst nemen van gepensioneerde of niet-gepensioneerde ouderen. De resultaten van de empirische hoofdstukken

laten zien dat dit onderscheid nuttig is geweest. Met name in hoofdstuk 5 werd duidelijk dat verschillende leeftijdsgerelateerde normen van topmanagers een rol spelen bij het gedrag van organisaties ten opzichte van gepensioneerden en niet-gepensioneerden. Ten tweede zijn theoretische concepten en inzichten uit verschillende sociaalwetenschappelijke disciplines gebruikt, waarbij de nadruk lag op concepten uit de economie (bijvoorbeeld productiviteitsindicatoren) en de sociologie (bijvoorbeeld leeftijdsgerelateerde normen). Het optreden van effecten van concepten uit verschillende disciplines toont de waarde en het nut van multidisciplinair onderzoek aan. Ten derde werd zowel het gedrag op organisatieniveau (hoofdstukken 2 en 5) als het gedrag van individuele managers (hoofdstukken 3 en 4) onderzocht. Uit de resultaten bleek dat er een continue wisselwerking optreedt tussen organisaties en managers, en dat ze niet compleet los van elkaar gezien kunnen worden.

Voortdurend onderzoek naar oudere werknemers blijft belangrijk met het doorzetten van de vergrijzing. Op basis van de resultaten van dit proefschrift kunnen enkele suggesties worden gegeven. Ten eerste zijn leeftijdsgerelateerde normen een interessant concept om verder te onderzoeken, aangezien zij een belangrijke rol spelen bij het bepalen van het gedrag van organisaties en managers. Een interessante vraag is hoe deze normen zich zullen ontwikkelen wanneer de vergrijzing verder doorzet en werken tot op hogere leeftijd vermoedelijk steeds meer gemeengoed zal worden. Daarnaast is het interessant of zij zich voor iedereen in dezelfde richting ontwikkelen of dat er verschillen zullen ontstaan in leeftijdsnormen voor mannen en vrouwen of mensen van verschillend opleidingsniveau. Ten tweede is het interessant om te onderzoeken hoe vraag en aanbod van oudere werknemers zich in de toekomst ontwikkelen en hoe deze ontwikkelingen verklaard kunnen worden. Door ontwikkelingen zoals vergrijzing, veranderende pensioenregels, maar ook verminderde pensioenopbouw en de gestage groei van het aantal zelfstandige ondernemers (die doorgaans geen of weinig pensioen opbouwen) zal het aanbod van mensen die tot op hoge leeftijd moeten werken om in hun onderhoud te voorzien stijgen. Daarnaast zullen er door een hoger opleidingsniveau en veranderende normen waarschijnlijk steeds meer mensen zijn die zelf actief willen blijven op de arbeidsmarkt tot op hogere leeftijd. Het is onzeker of de vraag naar oudere werknemers zich dusdanig zal ontwikkelen dat er voor al deze mensen voldoende werk zal zijn, of dat er bijvoorbeeld grote verschillen in mogelijkheden zullen ontstaan tussen hoger opgeleiden die uit persoonlijke motivatie actief willen blijven en lager opgeleiden die uit financiële noodzaak moeten doorwerken maar minder aantrekkelijk zijn voor werkgevers.

Behalve wetenschappelijk interessant zijn deze vragen ook maatschappelijk uiterst relevant. Op samenlevingsniveau zullen ook ontwikkelingen op economisch en politiek vlak hun effect

hebben op de arbeidsmarkt als geheel, en de arbeidsmarkt voor oudere werknemers in het bijzonder. Indien bijvoorbeeld een trend richting automatisering en robotisering verder doorzet zouden veel lager en middelbaar geschoolde mensen hun baan kunnen verliezen, waardoor er een groot overschot ontstaat op de arbeidsmarkt. Resultaten uit dit proefschrift suggereren dat veel oudere werknemers, behalve wellicht een kleine minderheid met unieke vaardigheden, dan weinig kans meer zullen hebben op werk, aangezien werkgevers een voorkeur hebben voor jonger personeel waarvan zij een hogere productiviteit verwachten. Een ander effect op samenlevingsniveau dat meer aandacht verdient is verdringing door langer doorwerkende ouderen. Hoewel de regering enkele maatregelen tegen verdringing door gepensioneerden heeft genomen (zij moeten bijvoorbeeld als eerste wijken bij reorganisatie) lijkt enige mate van verdringing onvermijdelijk. Doorwerkende gepensioneerden concurreren op de arbeidsmarkt vermoedelijk het sterkst met oudere werknemers die de pensioenleeftijd nog niet hebben bereikt. Het is belangrijk de effecten van verdringing beter te begrijpen, omdat juist deze groep kampt met een hoge mate van langdurige werkloosheid. Hoewel het vergroten van de mogelijkheden voor ouderen om langer door te werken op zichzelf een nobel streven is, moeten we ervoor waken dat dit niet teveel ten koste gaat van zekerheden en mogelijkheden op arbeid van andere leeftijdsgroepen.

Dit proefschrift heeft aangetoond dat veel organisaties in principe open staan voor langer doorwerkende ouderen, ook in de periode na pensioen, maar dat dit in de praktijk alleen plaatsvindt als er sprake is van een duidelijk toegevoegde waarde voor de organisatie. Verder is er veel diversiteit in de manier waarop organisaties met doorwerkende gepensioneerden omgaan, en zijn er ook werkgevers die onder geen beding gepensioneerden in dienst nemen. Naast organisatiefactoren spelen ook individuele houdingen van managers ten opzichte van ouderen een rol, en kunnen met name topmanagers een sturende rol hebben in het creëren van kansen voor ouderen door het scheppen van een positief normatief klimaat voor oudere werknemers. Ouderen die willen doorwerken doen er goed aan zich te realiseren dat hun kennis en ervaring hun belangrijkste eigenschappen zijn en dat het de moeite waard is zich continu te blijven ontwikkelen. Toch biedt dit geen garanties en kunnen de economische en organisatorische context werkgevers ertoe nopen ouderen weinig kansen te bieden.

Curriculum Vitae

Jaap Oude Mulders studied sociology at the University of Groningen and attained his research master degree in Social and Behavioural Sciences with a specialization in sociology (cum laude) there in 2012. From September 2012 until March 2016, he worked as a PhD candidate on the project *'Organizations, managers, and the employment of older workers after retirement'*, which was co-funded by the Utrecht University School of Economics and the Netherlands Interdisciplinary Demographic Institute (NIDI). In 2014, he received a PhD Short Stay Fellowship fund from Utrecht University to visit the University of Florida for two months. In 2015, he received the Junior Research Prize of the Utrecht University School of Economics for the PhD candidate with the highest sum of article influence scores in a year. He has presented his research at national and international conferences, such as the European Conference of the International Labour and Employment Relations Association (2013), Nederlandse Arbeidsmarktdag (2013), the Annual Meeting of the Gerontological Society of America (2013 and 2014) and the Annual Meeting of the Academy of Management (2015). Currently, Jaap is working as a post-doctoral researcher at NIDI on the VICI-project (granted to prof.dr. Kène Henkens) *'Ageing workers in an ageing society: Labour force transitions and work in late life'* and the Netspar-funded project *'Delaying retirement: Confronting responses of employees and employers'*.

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