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The changing nature of (un-)retirement in Germany: living conditions, activities and life phases of older adults in transition

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The changing nature of (un-)retirement in Germany: state of research and conceptual advancements¹

Abstract

In an aging work society, the transition to retirement represents a crucial passage in status for older adults. The conditions and the forms of the age-related status transition have changed substantially in Germany over recent decades. Thus, in addition to “indirect” retirement paths from various forms of non-employment, there is an increasing tendency to continue paid work beyond the regular retirement age limit. Moreover, older adults volunteer in civil society and are engaged within the family after retirement. These activities, together with prolonged labor market participation, form a central dimension of old age potential that can be a societal as well as an individual benefit. The aim of this paper is to review the current state of research, provide an overview of basic concepts as well as to advance the discourse on the transition to retirement and the potential of older people in Germany. One focus is on the labor market participation of older adults, even beyond the legal retirement age limit. In addition, we emphasize the interaction between different productive activities with regard to complementary or substitute relationships. These considerations are united in the concept of unretirement, which complements the traditional concept of retirement. A modified Rubicon model of action is presented as a heuristic framework for further empirical research on the labor market participation of older adults.

Keywords

Life course, older adults, transition to retirement, post-retirement employment, civic engagement, family work, Rubicon model of action

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Der Wandel des (Un-)Ruhestands in Deutschland: Stand der Forschung und konzeptionelle Weiterentwicklungen

Abstract

In einer Gesellschaft des langen Lebens stellt der Übergang in den Ruhestand für viele ältere Erwachsene eine zentrale Statuspassage dar. Die Bedingungen und die Formen des Altersübergangs haben sich in den letzten Jahrzehnten in Deutschland gewandelt. So ist neben „indirekten“ Übergängen aus einer Nichterwerbstätigkeit auch zunehmend eine fortgeführte Erwerbstätigkeit über die Regelaltersgrenze hinaus zu beobachten. Darüber hinaus sind ältere Erwachsene auch nach dem Ruhestandseintritt in der Zivilgesellschaft und der Familie engagiert. Diese Tätigkeiten bilden zusammen mit einer verlängerten Arbeitsmarktbeteiligung eine zentrale Dimension der Potenziale älterer Erwachsener ab, die in einer alternden Bevölkerung sowohl von gesellschaftlichem als auch von individuellem Nutzen sein können. Ziel des Beitrags ist die umfassende Darstellung, die Zusammenführung und die Weiterentwicklung der Diskurse um den Übergang in den Ruhestand und die Potenziale älterer Menschen in Wirtschaft und Gesellschaft. Dabei liegt ein Schwerpunkt auf der Arbeitsmarktbeteiligung älterer Erwachsener, auch über die Regelaltersgrenze hinaus. Hierzu wird ein Rubikon-Handlungsmodell dargestellt, das als grundlegender heuristischer Rahmen für weiterführende empirische Forschungsarbeiten in diesem Bereich dienen kann. Zudem wird die Wechselwirkung zwischen verschiedenen „produktiven“ Tätigkeiten im Sinne einer komplementären oder substitutiven Beziehung betont. Diese Überlegungen werden im Konzept des Unruhestands gebündelt, der den einseitig negativ konnotierten Begriff des Ruhestands ergänzen soll.

Schlagworte

Lebenslauf, ältere Erwachsene, Übergang in den Ruhestand, Erwerbstätigkeit, bürgerschaftliches Engagement, Familienarbeit, Rubikon-Handlungsmodell

Contents

1	Trends and consequences of demographic aging in Germany	7
2	The transition to retirement	8
2.1	Approach to a multi-layered phenomenon	8
2.2	What characteristics influence different retirement transitions?	10
2.2.1	Push and pull factors in retirement research	10
2.2.2	Additional factors influencing retirement transitions	11
2.2.3	Life course perspective on the transition to retirement	12
3	Formal and informal activities as potentials in older adults	12
3.1	The concept of productive aging	12
3.2	Paid work beyond the legal retirement age	15
3.3	Informal activities in family and civil society	17
3.4	Interaction between productive activities	18
4	Approaches to complement current retirement research	19
4.1	The transition to retirement as a decision-making or action process	20
4.2	The concept of unretirement – a differentiated view	21
4.3	The Rubicon model of participation in post-retirement activities	22
5	Summary and outlook	25
	References	27

1 Trends and consequences of demographic aging in Germany

The German population is one of the oldest in the world. In particular, constantly low birth rates and increasing life expectancy have led to a shift in the age structure towards an older society (Gärtner et al. 2005; Roloff 1996; Rowland 2009; Schwarz 1997). As a result, the median age of the German population rose from 37 to 45 years since 1990 (Statistisches Bundesamt 2015). Today, every fifth inhabitant of Germany is 65 years and older (Grünheid/Sulak 2016). Under the heading of “demographic aging,” this trend and its possible consequences have been recognized and fiercely discussed by demographers, economists, sociologists and gerontologists for several years (e.g. Mai 2003; Birg 2005; Schimany 2003, Straubhaar 2016).¹ Increases in the birth rate and immigration can only slow down this process in the coming decades, but will not stop or even reverse it² (Höhn et al. 2008; Pötsch 2016).

The shift in the age structure is reinforced by the high fertility cohorts in Germany. The majority of those baby boomers born between 1955 and 1968 are currently in their working phase of life. From 2020 onwards, these cohorts will gradually reach retirement age. As a result, the old-age ratio between the 65-year-olds and older per 100 and persons between the ages of 20 and 64 will increase dramatically between 2020 and 2030. Whereas, in 2013, there were 34 people who were at least 65 years old for every 100 persons in the economically active age groups, according to current population projections this number will rise to 65 persons in retirement age for every 100 between 20 and 64 years of age in 2060 (Statistisches Bundesamt 2015). This scenario is often discussed as a challenge for the social security systems in Germany³, in particular for the pay-as-you-go financed statutory pension insurance (e.g. Rolf/Wagner 1996; Dietz 2004) and for the health and long-term care insurance (e.g. Ulrich 2003; Ulrich 2005).⁴

In addition, as a result of the increase in life expectancy, the average duration of statutory pension payments has increased from ten to 19 years in the last five decades (Deutsche Rentenversicherung Bund 2015). In addition to an increase in the population of the pension age, this ongoing prolongation of the retirement phase can further exacerbate the pressure exerted by demographic change on the pay-as-you-go financed pension system. Against this background, it is not surprising that the demographic transition, as a synonym for a shrinking and aging society, is mainly linked to negative associations in public opinion.⁵

¹ The United Nations defines the term “demographic aging” as follows: “Population aging is a process by which older individuals become a proportionally larger share of the total population.” (United Nations 2002 quoted by Bijak et al. 2007: 3). Similar definitions can also be found in Gee: “...populations are ageing (i.e. the proportion of their population aged 65 and over is increasing)...” (Gee 2002: 751), Lit: “The term [population ageing, A.M.] refers to a steady increase in the percentage of elderly in a country’s total population from under 5% to more than 25%.” (Lit 2006: 618) as well as Lloyd-Sherlock: “Demographic ageing (defined as an increase in the percentage of a population aged 65 years old or over)...” (Lloyd-Sherlock 2000: 888).

² According to calculations by the Population Division of the United Nations (UN), 3.4 million immigrants would be required every year to keep the ratio between the population of working age (20 to under 65) and the 65-year-old and older in Germany constant, which corresponds to a total number of nearly 190 million people by 2050 (United Nations 2001).

³ Criticism of the discrepancy in the burden on social security systems linked to demographic change is expressed by Niephaus (2016) and Bäcker et al., 2010.

⁴ The rate of health expenditure is closely linked to higher age groups, especially the highest age. For example, the per capita health expenditure for over 85-year-olds in the Federal Republic of Germany is more than twice as high as for the age group between 65 and 84 years (Ulrich 2005). It therefore seems plausible that the rise in the population of old and elderly people as a result of demographic change will increasingly affect the care and health systems of the countries affected in the coming decades. On the basis of model calculations, assuming constant age-specific health costs, it can be assumed that the aging of the German population will lead to an increase in overall health-related expenditure by more than 30% within the next 50 years. In particular, costs will have to be incurred that must be spent on the care of elderly people (Ulrich 2004).

⁵ An overview of the mostly negative to alarmist headlines on the consequences of the demographic transition in the German press is provided by Frevel (2004).

And yet old age has changed fundamentally in recent years: on the average, older people are healthier, better educated, more prosperous and less engaged in childcare due to more widespread childlessness than previous birth cohorts (Künemund 2006; Aner et al. 2007; Mai 2003; Dorbritz/Schneider 2013). Against this background, the “potentials of old age” are particularly emphasized in political and academic discussions (e.g. BMFSFJ 2005; Kocka/Staudinger 2010; Kruse/Schmitt 2010; Backes 2008; Backes/Amrhein 2008; Klös/Naegele 2013). From a societal perspective, the extent to which older people can contribute to intergenerational solidarity is of general interest – and how resources of older adults, in particular, can be used for politically shaping demographic change. In this con-text, reference is made not only to the participation of older people in the labor market, but also to their commitment to civil society as well as to their contribution to family life.⁶

At the same time, empirical findings show that societal conceptions of “standard life courses” (Kohli 1985) and “normal (occupational) biographies”⁷ have changed and that status passages, as socially normed transitions in the life course, have been increasingly de-standardized or at least “softened” (Sackmann 2007; Scherger 2007). The transitions between individual phases of life, especially between working life and retirement, are becoming less fixed. Against this background, the question arises as to whether linking the statutory retirement age with calendar age still reflects life realities and the potential for personal development in the second half of life (Kruse 2010). In addition, little is known about how the described changes in the contexts of aging – improving the life situations of the elderly, the model of productive aging, the prolongation of working life – are perceived, reflected and valued by the members of society and what action responses ensue.

This paper is based on several strands of discourse that have arisen with regard to the extent, dynamics and consequences of the demographic aging process in Germany. The paper focuses on the transition to retirement, central passage in late adulthood with important implications for individuals, families and society. The aim is comprehensive review and conceptual advancement combining different paths of empirical research and theoretical approaches as a starting point for further research.

2 The transition to retirement

2.1 Approach to a multi-layered phenomenon

Historically-speaking, the social institution of retirement (Atchley 1982), defined as an age-related withdrawal from working life, usually associated with the receipt of an old-age pension (Börsch-Supan et al. 2004, Henkens/van Dalen 2013) is a relatively new life phase that was established in Germany only with the introduction of statutory pension insurance in the late nineteenth century (e.g. Kohli 1987). Since then, it has defined the

⁶ This discourse about productivity and competence, however, is also countered by critical voices that warn against the instrumentalization of older adults and the social stigma of supposedly unproductive older people if their lives do not correspond to the model of active or productive aging (e.g. van Dyk/Lessenich 2009; van Dyk et al. 2010; Denninger et al. 2014). In the sense of a “happy gerontology,” gerontology is accused of emphasizing unilaterally positive perspectives on aging and thus of establishing a continuity between middle and old age (van Dyk 2014). Taken together, both discourse strings implicitly reflect the diversity of aging, not only in terms of mental or physical resources as well as individual life schemes and forms, but also of different age patterns as well as social inequality in life opportunities (e.g. Kocka/Staudinger 2010; Backes/Amrhein 2008; Amann/Kolland 2008) as found in various constellations of productive activities in early retirement age (Mergenthaler et al. 2015).

⁷ Dependent full-time employment, which is non-temporary and subject to social insurance, is generally referred to as a normal employment relationship (e.g. Dietz/Walwei 2009; Keller/Seifert 2009; Kurz et al. 2006).

last segment of the three-part life course (after schooling and working; Kohli 1985; Kohli 2007), and thus the beginning of old age, as a distinct life phase (Kohli 2000). It also helps to regulate the succession between the generations on the labor market and is therefore a central component of the life course regime as organized by the welfare state (Kohli 1985; Kohli 1991; Ekerdt 2010). As a vanishing point of the life course in modern work society, the transition to retirement represents a biographical change that requires individual adaptation and adjustment (Rosenkoetter/Garris 1998) to a “late freedom” (Rosenmayr 1989) or even to a “roleless role” (Burgess 1960).

The transition to retirement has been reformed since the 1990s in Germany (Buchholz et al. 2013; Ebbinghaus 2015) in the context of demographic change and a continually increasing retirement period since the middle of the twentieth century (Deutsche Rentenversicherung Bund 2015) to gradually move towards an extension of working life. This development marks the provisional endpoint of a twofold paradigm shift of German pension policy (Bäcker et al. 2009). While an early retirement trend was promoted from the 1970s to the 1990s in order to “make room” for future generations on the labor market, a reversal of this trend has taken place since the 1990s, one visible sign of which is the “retirement pension at 67.” A major policy objective in the Lisbon strategy of the European Union was to increase the employment rates of older workers between 55 and 64 years in the EU Member States to 50% by 2010 (e.g. Annesley 2007). Due to the baby boomers entering retirement and the ongoing increase in life expectancy (Statistisches Bundesamt 2015), further social developments and legal adjustments are necessary in order to regain the fiscal sustainability of the public pension system. Therefore, in the coming years, retirement research will gain even more relevance than today.⁸

What is meant by the term “retirement”? The large number of definitions in the literature illustrates the fact that retirement is a heterogeneous and therefore an elusive phenomenon: it refers to an event, a process, a status, a life phase or a role (Marshall 1995; Hardy 2012). For example, retirement age is determined by the end of the career job, a reduction in the amount of work, a retirement pension or retirement or self-assessment (Denton/Spencer 2009; Beehr/Bowling 2013; Ekerdt 2009b; Börsch-Supan et al. 2004). As a result of several pension and labor market reforms introducing “indirect” retirement transitions, i.e. changes from non-active or unemployed persons to old-age retirement, the pathways to retirement have become more diverse in Germany (Engstler 2006; Zähle et al. 2009)⁹. Scholars therefore speak of a de-institutionalization of the transition to retirement (Sargent et al. 2013). In addition to the rising trend of early retirement arrangements and diverse indirect pathways into retirement, a new phenomenon of the blurred line between work and retirement has been recognized and discussed in retirement research, namely working in retirement (alternative expressions are “post-retirement work,” “bridge employment,” “silver work,” “unretirement,” or “re-retirement,” e.g. Wang/Shultz 2010; Deller/Maxin 2008). This work-retirement pattern has been examined in the USA since the 1990s (e.g. Ruhm 1990; Beehr/Bennett 2015), whereas in Germany this issue is still a “young” field in retirement research (e.g. Hofäcker/Naumann 2015).

These fluctuations from work to retirement and back again suggest that there may be multiple phases of retirement or “unretirement” in the late life course interrupted by shorter episodes of paid work (Shultz/Wang 2011). These findings underline the fact that the transition to retirement is less an on/off event than a process that can span several years and can be circular (Beehr 1986; Feldman 1994; Pleau 2010). As a result of these diverse paths, modern retirement research conceives this transition as a multi-stage decision-making process with different influencing factors that takes place over a certain period of time; it begins with a preparatory phase and ends with an adaptation process in the post-work phase (Shultz/Wang 2011). Post-retirement work can be seen as one

⁸ With regard to the USA, Zhan et al. (2009) as well as Wang and Shultz (2010) come up with a similar prognosis.

⁹ However, on the basis of a sample from the German pension insurance it was shown that the share of direct retirement transfers increased again by 2010 (Brussig 2012). This could indicate a reversal in the trend of a rising share of indirect transfers to retirement.

characterizing signal (among others, such as a large variety of ways of life or household constellations) within the fuzzier life phase called the “midcourse-phase” in this process (Moen 2003).¹⁰

Against the background of the concepts discussed in the recent discourse, we define the retirement transition as a *process of indefinite duration comprising individual plans, decisions and actions as well as individual and social reconciliation and adaptation processes with the aim of implementing age-related withdrawal from employment.*

Retirement is defined in this paper as a *period of life characterized by a relatively fixed entry age (statutory retirement age), which is accompanied by income from a retirement annuity or pension from one’s own employment during earlier life stages and by disengagement from social or economically productive activities, in particular employment.*

2.2 What characteristics influence different retirement transitions?

2.2.1 Push and pull factors in retirement research

For the analysis of the transition to retirement – in particular early retirement but also in the case of continued employment beyond the statutory retirement age – the so-called “push and pull” factors are often cited as influencing variables (Ebbinghaus 2006; Ekerdt 2009b; Radl 2007; Shultz et al. 1998). According to this approach, the older adult is drawn into retirement by attractive conditions (pull factors), for example financial incentives from the retirement insurance systems but also the pursuit of non-professional interests in retirement (Ekerdt 2009b; Shultz et al. 1998). Examples of pull factors that draw the individual into continued employment beyond statutory retirement age are the non-economic benefits of work, such as the feeling of being needed, shared experiences, commitment to the profession or maintenance of social contacts (Barnes et al. 2004; Wang et al. 2014).

Push factors, on the other hand, emphasize unfavorable labor market conditions such as lower demand for older workers or company reorganization strategies resulting in above-average layoffs of older workers as well as personal factors such as health problems (Radl 2007; Shultz et al. 1998). Regarding continued employment beyond the legal age limit, push factors would be the economic situation in retirement age, such as inadequate pensions due to interrupted earning biographies but also contextual influences such as non-simultaneity in the retirement of life partners or occupational group-specific normative expectations of longer employment. In addition, human capital and employment opportunities are highly important for enabling employment beyond the legal retirement age limit. Since these factors are unequally distributed across different individuals and contexts (Scherger 2011), they can be both push and pull factors. Finally, it should be borne in mind that although push and pull factors are often associated with the (lack of) freedom regarding individual decision-making (Shultz et al. 1998), they represent the extremes of a spectrum along complex and sometimes ambivalent constellations of influences on the willingness to continue employment.

Both types of influencing factors can be linked to one another in the context of a life course perspective (Radl 2007). In addition to economic or health constraints, there are also a variety of individual motives concerning the age transition such as family obligations (e.g. care of relatives), interdependent retirement decisions in the partnership context or previous unemployment (Ho/Raymo 2009; Schneider et al. 2001). Moreover, life course approaches also refer to the normative dimension of legal age limits. Thus social expectations and institutionalized normality correlations are combined with the social

¹⁰ In addition, the transition to retirement plays an important role in the concept of the third age, since it usually coincides with the beginning of this part of life and then typically ends with emerging age-related health restrictions, which lead to the need for assistance from other persons (Carr/Comp 2011; Weiss/Bass 2002; Laslett 1987).

policy requirement of an age of 65 years (Jansen 2013; Radl 2012a). In this respect, it can be assumed that for many employees, the widespread use of early retirement schemes between the 1970s and 1990s evolved to become a normative expectation as well as a perceived social entitlement (Ekerdt 2009b; Scherger 2011).

An explanation of the subjective willingness to extend working life depends on whether the influencing factors identified in the literature on early retirement (Bäcker et al. 2009; Radl 2007) can be fully adopted.¹¹ Abandoning these specific factors pushing or pulling one into early retirement can only result in retiring “on time” (in accordance to the legal retirement age), as labor contracts in Germany usually end along with this legal framework (Bertelsmann 2010; Hofäcker/Unt 2013; Hokema/Lux 2015). The missing link in this context is primarily associated with psychological aspects such as attitudes towards the relationship between work and (post-)retirement, the need for personal continuity, or anxiety about retirement reflecting its typical approach-avoidance conflict (e.g. Bonsdorff/Ilmarinen 2013; Fasbender et al. 2014; Newman et al. 2013). Nevertheless, in a life course perspective, the analytical distinction between push and pull factors is still a reasonable conceptual basis to systematize possible factors of influence on the willingness to extend employment beyond legal retirement age. Which factors individuals perceive as push or pull factors depends on their respective context such as (un-)favorable labor market conditions, family obligations, individual resources and socio-economic status (Radl 2012b; Shultz et al. 1998).

2.2.2 *Additional factors influencing retirement transitions*

In addition to institutional regulations and conditions within a company (e.g. statutory pension insurance or age climate), the process of retirement also involves individual skills, personality traits and decisions, family obligations (e.g. the care of a dependent relative), as well as social structural and economic characteristics, like accumulated financial resources, occupational position or human capital (Adams 1999; Beehr et al., 2000; Scherger, 2013). Recent studies from Germany indicate that retirement transitions differed, among other things, according to the level of formal education (Radl 2007; Engstler/Romeu Gordo 2014).

Additionally, the working atmosphere and cultural patterns manifested in personal or socially shared notions of aging (Wurm/Huxhold 2012; Pichler 2010, BMFSFJ 2010) are also important for shaping the transition to retirement or the continuation of employment (Jansen 2013; Ernsting et al., 2013). This concept is described as “... notions of old age as a life phase, of the process of aging and as ideas about the elderly” (Rossow 2012). Notions of aging reflect socially prevalent concepts of “normal” aging. The notions of aging in a society therefore also need to be understood against the background of (symbolic) power relationships. Such models not only reflect the social climate, but also contribute to the social structure of life segments and transitions (Pichler 2010).

Gender also influences transitions into retirement. Thus, due to increasing labor participation of women in Western Germany (the new federal states already had a very high rate of working women as a “legacy” of the former labor market conditions in the German Democratic Republic) the process of retirement in female life courses is becoming increasingly important. However, the employment biographies of men and women differ markedly, for example with regard to the higher proportion of women employed as parttime employees. In retirement research, a “gender lens on aging” (Venn et al. 2012; Lasch et al. 2006) therefore marks a desideratum for women. Retirement research has so far concentrated on the retirement of men (Radl 2007). Empirical research on “typical female” retirement transitions in (Western) Germany underline the importance of this issue. In line with the conservative view of different labor market participation by the

¹¹ For example, a poor state of health is likely to lead to early retirement. On the other hand, a (very) good state of health is not a guarantee of extended working life since it is conceivable that an individual might like to quit working and enjoy retirement, especially if their state of health is good (e.g. Micheel et al. 2010).

genders (Hofäcker et al. 2013; Meyer/Pfau-Effinger 2006; Pfau-Effinger 2004), female retirees in (Western) Germany typically exhibit career paths with interruptions of gainful employment due to childbearing and childrearing. Additionally, when returning to work, many women tend to work part time. Therefore, it is not surprising that these career paths result in lower incomes and finally to lower pensions compared to men (Allmendinger 1990; Fasang et al. 2013; Hank/Korbmacher 2012). Younger cohorts of women today have a stronger attachment to paid work, as indicated by higher employment rates compared to older cohorts, but still less than their male counterparts (e.g. Fitzenberger et al. 2004). This labor market trend begs the question of whether the current political focus, and therefore research focus, on male careers is still relevant.

2.2.3 *Life course perspective on the transition to retirement*

The timing, the duration and the form of a transition to retirement, as well as the distribution of resources and potentials in this phase of life, are dependent on the course of earlier life phases (Klös/Naegele, 2013; Elder 1994; Elder 1985). The investigation of transitions and potentials in the later stages of life can thus not be exclusively related to these, but should take the entire life course, at least the earlier employment phase or biography, into view. For this reason, the life course perspective is a basic approach in aging and retirement research (Marshall/Bengtson 2012; Silverstein/Giarusso 2012).

In this context, the concept of “linked lives” (Elder 1995), which explicitly takes account of the partnership context in retirement planning and decision-making, plays an essential role. This concept, which is central to the life course approach, assumes that people’s life courses are interlinked by social relations (Elder 1994). Life courses and paths as well as the transitions between different segments of life can only be understood through the interaction of the affected persons with other people, whether family members, friends or colleagues (Huinink 2009). Transitions in a person’s life often result in transitions for other people, such as when a working couple decides to enter retirement together (Ho/ Raymo, 2009; Elder et al. 2003).

In summary, current research on retirement reveals gaps in (1) the description of the retirement process, (2) the interaction between individual and contextual influences with regard to the beginning, form and duration of the transition, (3) the consequences of voluntary or involuntary forms and (4) the importance of retirement as a further career segment in cases of prolonged labor market participation (Wang/Shultz 2010). On the one hand, these research gaps indicate the importance of individual decision-making and action as a theoretical foundation for current retirement research. On the other hand, they emphasize interactions of individual decision-making, coping and adaptation processes with social and contextual characteristics (e.g. partners or employers). It can thus be concluded that a *dynamic multi-level approach* would be helpful for the conceptual development of retirement research in order to merge the separate discourse strands.

3 **Formal and informal activities as potentials in older adults**

3.1 **The concept of productive aging**

The term “productive aging” has a long tradition in social gerontology dating back to the 1980s when it was first used by Robert N. Butler (Butler/Gleason 1985; Bass/Caro 2001; Achenbaum 2001). The origin of the concept of “productive aging” lies in the discourse on generational equality in the USA (Moody 2001). The concept was initially developed as a counter-concept to ageism in order to overcome negative stereotypes

about older people and to emphasize that it is both, the responsibility of society and the individual to support the realization of the potential of aging (Taylor/Bengtson 2001; Hinterlong et al. 2001). The model of productive aging emerged against this background and as a response to the discrepancy between increasing individual capacities and the availability of institutionalized productive roles for the elderly. Advocates of productive aging question the assumption that the majority of older adults are no longer able to contribute to the common good and are merely consumers of resources (Hinterlong et al. 2001). The concept sees higher age as a time of personal growth and social and economic contribution. The emphasis is thus on the performance of older people and a “need to be needed” as a way of assessing higher age. Productive aging emphasizes generativity as a superior value throughout the entire life course. Generativity means that relationships between older and younger generations create a productive context for both; the younger generation benefitting from the experience and education of the older generation, the older generation receiving a context in which their values and cultural identity can be preserved (Lang/Baltes 1997). Moreover, caring for upcoming generations fulfills the desire for symbolic immortality and the feeling of being needed (McAdams/de St. Aubin 1992). The focus of the discourse on productive aging is usually economic: both monetary and non-monetary aspects of social exchange and the reduction of age-related dependency play central roles (Moody 2001). The concept of productive aging postulates that older persons should be engaged in a way that benefits other people, and, in exchange, that society, the economy and politics should provide or expand options for it. This demonstrates that the core is a normative theory that implies a corresponding policy or program (Sherraden et al. 2001).

There are different definitions of this concept and its underlying dimensions in the literature (Bass 2011).¹² In addition to productive activities, the latter also consider those who create the individual conditions for them, such as physical activity (Caro et al. 1993, Herzog 1989). In the following, we refer to a wider definition of “productivity” *that includes any activity that produces goods or services, regardless of whether it is paid or not* (Bass/Caro 2001).¹³ According to the third-person criterion, these are marketable activities that could also be provided by third parties (Hawrylyshyn 1977). According to this definition, productive activities refer not only to forms of employment, but also to civic engagement, which includes formal volunteering as well as informal assistance (Hank/Erlinghagen 2010) or civil society participation (Burr et al. 2002; Martinson/Minkler 2006) as well as support within one’s own family¹⁴, such as childcare or caring for a sick or disabled relative (Wija/Ferreira 2012; Caro/Bass 1995).¹⁵

Like the concept of successful aging¹⁶, the concept of productive aging links the final phase of life with a positive value that is in contrast to age stereotypes, which essentially

¹² O’Reily and Caro (1995) provide an overview of early but still valid definitions of the concept.

¹³ From an economic perspective, only those activities that are offered on the (labor) market for payment and thus contribute to the gross social product (Fernández-Ballesteros et al. 2011) would be defined as productive. Such a narrow definition excludes activities that are of social benefit but are unpaid or voluntary.

¹⁴ In addition to these basic dimensions of productive aging, the literature also mentions career-related or personal education as well as self-realization and wisdom as further categories (Bass/Caro 2001; Sherraden et al. 2001).

¹⁵ This concept of “productive aging” is also based on the fifth and sixth edition of the old-age reports of the Federal Government of Germany. Under the title “potentials of old age,” the productive activities of older people and their future development possibilities are seen as essential components of a strategy for dealing with the challenges of demographic change (BMFSFJ 2005; in a critical perspective see for example, Denninger et al. 2014).

¹⁶ The concept of successful aging, which is widespread in social gerontology, was introduced into the discourse by (Rowe/Kahn 1997). Although it is currently the dominant conceptual approach to aging research, it has often been discussed critically in the literature (for an up-to-date overview, see Martinson/Berridge 2015). For example, according to Liang/Luo 2012, the concept negates the higher age of life by propagating “agelessness”. The discourse on successful aging is based on the assumption that the ability to remain young and active is the key to “good” aging. Another criticism is related to the proximity of the concept to neo-liberal approaches, which also emphasize individual responsibility for a successful life (Rubinstein/Medeiros 2015).

associate aging with passivity and loss of function (Moody 2001).¹⁷ In contrast to the concept of successful aging, which largely ignores the social structure or the macro-social context of individual aging and focuses on individual physiological and psychological capacities and abilities, the concept of productive aging is, however, more strongly related to economic and sociological theories (e.g. social constructivism, exchange theories, life course perspective or critical theory). In contrast to the social psycho-oriented concepts of activity or disability management, productive aging is about the role and the contribution that older people can make to the functioning of societies and the reduction of barriers to the productive participation of older adults (Taylor/Bengtson 2001; Caro et al. 1993; Bass/Caro 2001). In summary, there are several aspects that can be used to enrich gerontology through the concept of productive aging: (1) The term “productive” reflects a positive perspective on human aging, (2) productive aging offers the possibility of quantifying the contributions of older people, (3) there may be a greater interface between theory and intervention approaches in gerontological practice and policy when productive aging is used as a heuristic or theoretical framework and (4) the perspective is less individualistic than the concept of successful aging (Taylor/Bengtson 2001).

Nevertheless, several conceptual and theoretical questions about productive aging remain to be explored (e.g. Sherraden et al. 2001). Theoretical contributions are, however, important for the future development of the concept of productive aging in order to classify the ever-increasing empirical findings and to derive recommendations for political practice from this (Taylor/Bengtson 2001). For this, middle range theories are available from which empirical questions can be derived (Sherraden et al. 2001). In order to bundle known influencing factors of productive activities in the higher adult age, Caro and Bass (2001) developed a conceptual framework for productive aging, which covers the levels of social policy, environment, situation, individual and individual conditions. It is thus a multi-level model that represents the micro- (individual), meso- (situation) and macro-levels (environment, social policy) and their relationships to each other. A similar model is formulated by Sherraden et al. (2001). In this heuristic model, the dimensions of politics, socio-demography, individual capacity, institutional capacity, productive activities and certain individual states (e.g. health, partnership satisfaction) are related. Although social contexts are explicitly taken into account, the authors emphasize that the level of action or the level of individual decision-making is central to the concept of productive aging (Sherraden et al. 2001). However, Sherraden et al. (2001) did not derive an action model or differentiate between decision-making or action phases. There is thus still a considerable need on the micro level for conceptual and theoretical further development of existing approaches.

Even if representatives of the concept of productive aging refer to social and societal contexts more strongly than is the case with other gerontological approaches, social inequality of life chances and resources is only conceptualized at a marginal level (Künemund 2006). However, social inequalities in resources across the life course play an essential role in exploring the potential and productive activities in late adult age (Backes/Amrhein 2008). These can lead to strong differences between social groups in resources and activities in the form of an accumulation of advantages or disadvantages over the life course (Dannefer 2003; Ferraro et al. 2009). Such unequal social conditions influence the likelihood and the motives for the reception or continuation of an activity in retirement age, for example, when precarious living conditions in retirement make it necessary to engage in paid work in order to escape poverty (Hochfellner/Burkert 2013; Brüssig 2009). In addition to individual, familial and institutional characteristics, the socioeconomic living conditions of older people thus have a significant potential for explaining everyday life in the transition to retirement, which has so far rarely been

¹⁷ Both successful and productive aging are based to a certain extent on activity theory, which assumes that activity fosters life satisfaction, and the continuity thesis, which assumes that basic activity patterns remain stable even during the adaptation of humans to their own aging (Johnson/Mutchler 2014).

empirically investigated in German-language aging and retirement research (Clemens 2008). Reducing this gap is an essential prerequisite for a representative description and assessment of the potential of older people.

In addition to the advantages of the model of productive aging, there are also a number of critical aspects that make dealing with this approach more difficult, such as a normative concept of “busy ethic” (e.g. Ekerdt 2009a) that is likely to stigmatize “unproductive” ways of aging. Therefore, the underlying assumptions should always be thoroughly explained in order to avoid ambiguous meanings of the term. Insofar, productive aging is a fluid concept whose definitions vary according to context. The macroeconomic and historical contexts in which productive activities of older people are embedded are rarely taken into account by research. Furthermore, the perspective of productive aging has parallels with general social or aging theories (e.g. disengagement) that seek both micro- and macro-level explanations. Therefore, there is a risk that the approach gets lost in claiming to be a holistic explanation of human aging that cannot be empirically explained (Taylor/Bengtson 2001). In order to circumvent the normative implications¹⁸ of the concept, some authors also suggest that instead of the term “productive aging” one should speak of productivity at a higher age, since this concept allows for a more empirical approach. Moreover, the competition with other concepts such as that of successful aging is bypassed and it does not include an explicit evaluation (Morrow-Howell et al. 2001).

3.2 Paid work beyond the legal retirement age

Employment after reaching retirement age has become more important in Germany in recent years (Hofäcker/Naumann 2015). The first empirical studies on this phenomenon are from the 1990s (e.g. Kohli et al. 1993; Wachtler/Wagner 1997).¹⁹ Since the beginning of this millennium, there has been a steady increase in employment beyond the legal retirement age in Germany (Deller/Pundt 2014; Hofäcker/Naumann 2015; Scherger 2015). This increase is not merely an effect of advancing demographic aging as a result of ever-increasing numbers of the population reaching retirement age. Additionally, altered employment behavior of older adults plays an important role in explaining this phenomenon (Micheel/Panova, 2013).

“Pensioner’s work” (Wachtler/Wagner 1997) is mostly parttime work, which means the amount of weekly working hours is generally up to a maximum of 30 hours. Furthermore, such activities are usually carried out only for a relatively short period of time after reaching retirement age (Dorbritz/Micheel 2010; Lippke et al. 2015; Scherger et al 2012; Hokema/Lux 2015). Compared to dependent employees, self-employed and assisting family members are clearly overrepresented among the labor force in retirement age (Deller/Maxin 2009; Maxin/Deller 2010; Scherger 2013).

The influence of individual, socioeconomic and occupational characteristics on the likelihood of continuation of employment beyond the legal retirement age was empirically investigated by several studies in Germany.²⁰ The employment rate shows a steep decline

¹⁸ The normative meaning of productivity in modern market-economy societies can be summed up by the following quotation: “The opposite of the term productivity implies ‘unproductivity’ or ‘laziness’ which in our capitalist society means ‘failure’” (Taylor/Bengtson 2001: 138).

¹⁹ In contrast, “bridge employment” has been the subject of scientific studies for a long time in Anglo-American economies. This form of employment is a widespread transitional path to retirement particularly in the United States (e.g. Ruhm 1990; Giandrea et al. 2009; Beehr/Bennett 2015).

²⁰ Regarding the willingness to continue employment in pension age, several factors can be distinguished (Scherger 2011; Wang et al. 2014): (1) the individual economic situation of a person in retirement age, (2) their human capital (education, health, etc.); (3) specific employment opportunities and conditions (e.g. occupational age climate, flexible working forms), (4) the non-economic benefits of labor, (5) further contextual characteristics (e.g. family situation, social age patterns), and (6) psychological factors such as the five main dimensions of the personality (so-called Big Five).

after the age of 65 (Deller/Maxin 2009; Scherger 2013). Unequal access of women and men to the labor market continues to exist even after the transition period has been reached. Thus, men also show a significantly higher employment rate than women in the age group 65 years and older (Hochfellner/Burkert 2013; Scherger 2013; Hofäcker/Naumann 2015, Micheel/Panova 2013; Cihlaret al. 2014). One's former professional class before retirement age also influences the chance of continued employment: members of the upper class (for example, scientific professions, managers) are more active than members of lower professional classes, such as non-executive employees and workers as well as unskilled or semi-skilled workers. In addition, divorced or separated people are more likely to work during retirement age than people living in a partnership (Scherger 2013). Western German retirees show a higher employment rate than pensioners from Eastern Germany (Hofäcker/Naumann 2015). This distribution reflects the unequal labor market opportunities and structural differences still existing between Western and Eastern Germany (Scherger 2013). In addition, good health promotes the continuation of employment beyond the legal retirement age (Deller/Maxin 2009; Scherger 2013).²¹

The present findings on the link between the financial situation of older adults and retirement are not clear. Studies report an inverse association – the lower the household income, the higher the chance of employment in retirement age (Deller/Maxin 2009) as well as a positive relation (Scherger 2013). An inverse association between continued employment in retirement age and the “Engeltpunkte” (earning points) that determine the amount of German pension insurance was observed in a sample of autochthonous Germans while a positive association could be shown for older immigrants (Hochfellner/Burkert 2013). Another study noted that retirees from households with debts worked more often than older people without debts (Scherger 2013). Results of evaluations of the German Ageing Survey (DEAS) point to a U-shaped relationship between the formal education level and the probability of earning in the pension age in the 2000s that was not observed during the 1980s or 1990s. This trend indicates that in the 2000s both people with lower and higher educational levels exhibited higher employment rates compared to average educational levels (Hofäcker/Naumann 2015). Operational characteristics or organizational framework conditions also have an effect on retirement. For example, findings indicate the importance of flexibility and corresponding offers on the part of the employer (Deller/Maxin 2009). The nature of the transition to retirement also influences the likelihood of continued employment beyond retirement age. For example, a period of non-employment before retirement reduces the chance of continued labor market participation (Hochfellner/Burkert 2013).

The present empirical findings from Germany show that paid employment beyond legal retirement age is a current and relevant phenomenon. However, almost only descriptive findings or exploratory analyses are available. With the exception of heuristics for the systematization²² of influencing factors (Scherger et al. 2012; Scherger 2015), theoretical approaches to interpreting the present empirical findings and as the basis for further studies are scarce in German-language sociological research. In German-language psychological research, several theoretical frameworks regarding post-retirement work have been examined, such as work motivation (Maxin/Deller 2010), the approach/avoidance conflict (Fasbender et al. 2014) and generativity (Fasbender et al. 2016).

²¹ Since these findings are based on cross-sectional data, no statements can be made about causality. Thus, good health can also have a selective impact on the labor market participation of retirees, meaning older people are consciously withdrawing from the labor market because of good health in order to achieve other life goals.

²² This heuristic systematization is derived from a theoretical two-stage selection process on the post-retirement labor market (Hardy 1991): the first stage is characterized by a self-selection process within the retiree group yielding a group of retirees with a pronounced will to work in retirement. This step is crucial for this approach, as retirees, particularly in Germany, are “normally” expected not to participate in paid work (Freter et al. 1988, Kohli 1987; Scherger et al. 2012). The second stage is defined by the economic principle of supply and demand on the labor markets, which applies to both persons of employable age and people of retirement age. Here, the research focus lies on the competition between these two groups seeking work.

3.3 Informal activities in family and civil society

Recent approaches that define retirement on the basis of activities focus not only on paid work but also on informal activities, such as civic engagement or support services within the family (Aleksandrowicz et al. 2010; Denton/Spencer 2009). Informal activities are defined as work for which no wage or compensation is paid and for which therefore no taxes or social security contributions are paid (Hank/Erlinghagen 2008). However, informal activities might also generate a profit that can be measured economically, at least as an equivalent (Hawrylyshyn 1977).

In addition to volunteering, the forms of civic engagement of older people include neighborhood or network assistance. These forms of commitment take place outside their own household. In general, volunteering is linked to an organization, institution or non-profit organization, and to exercising a specific function or task or a specific office. Neighborhood and network assistance, on the other hand, take place without such connections and are of a more private nature. They include all support services by older people (e.g. household help, shopping, cleaning or minor repairs) for neighbors or friends who live outside their own household (e.g. Künemund 2005; Hank/Erlinghagen 2008).

Family commitments are defined as all supporting activities carried out within one's own household or one's own family. Two forms of family involvement are especially important: childcare as well as nursing or other care and supportive services. Since the family and the interrelated generations embedded in it are directly affected by the consequences of social and population change (Dorbritz/Schneider 2013; Mahne/Klaus 2017), familial commitment is an important aspect of productive aging. Families have changed fundamentally in recent decades. Thus the generations may live together longer than ever before due to the life extension process, which partly compensates for late childbearing age. As a result, the three-generation family currently represents the typical familial-generational constellation in Germany (Grünheid/Scharein 2011). However, the low birth rate affects the number of relatives per generation, which is decreasing. The development of such "bean families" (Bengtson et al. 1990) has the effect of altering the opportunities for family support between generations, both young and old, as well as from old to young in the course of demographic change. This also means that in the future there will be an increasing number of older people who cannot rely on the support of their own children or grandchildren if they are childless or if job mobility requirements make regular contact more difficult (Dorbritz/Schneider 2013).

Regarding civic engagement, empirical findings show that it is influenced by institutional and socio-cultural frameworks. Moreover, resource allocation of individuals with human, social and cultural capital, basic demographic variables and individual life histories also plays an important role (Wilson/Musick 1997a; Wilson 2000). Compared to non-committed persons, civic-oriented individuals can generally be described as more educated, healthier, more often married and with higher incomes and stronger religious orientation (Choi 2003; Wilson 2000; Wilson/Musick 1997a). Although voluntary commitment is more widespread among younger age groups, a sustained and significant increase in the commitment rate (BMFSFJ 2010) has been seen among older adults, especially among 60- to 69-year-olds since 1999. Regarding the influence of individual life courses, in a number of studies, Erlinghagen (2008: 95) refers to the distinction "...between the short-term effect of singular life events such as the marriage, divorce, death of the partner or the birth of a child [...] and the long-term effect of past experiences, such as socialization in the family [...] or the cultural imprint of entire birth cohorts." An example of the effect of previous experiences can be found in Mutchler, Burr, Caro (2003; see also Lancee/Radl, 2014; Maas/Staudinger 2010). The authors show that previous engagement is a strong and significant predictor of formal volunteering and informal help. Individual life events also influence individual commitment. For example, the death of the spouse leads to an increase in informal social participation in widowed women and men (Utz et al. 2002).

Individual resources and institutional frameworks also play an important role in participation in family work (e.g. Hank/Stuck 2008; Ruckdeschel/Ette 2010; Eichler et al. 2008). However, care and nursing care within the family are largely dependent on the respective needs and obligations, that is, on the extent to which children or persons in the family are present who need care (Cihlar/Mergenthaler 2016). Another special feature that plays an important role in nursing care is a person's extent of moral commitment and self-determination. As the name suggests, formal volunteering activities are generally based on a voluntary decision – no one is forced into volunteering (analogous to political involvement, see Verba et al. 1995). On the other hand, care is often of a compulsory nature, since the person needing nursing is often a close relative of a family member who feels obliged to care for them (for example, married couples; Eichler/Pfau-Effinger 2008).

3.4 Interaction between productive activities

In most empirical studies, productive activities in older adulthood are presented as independent phenomena (e.g. Künemund 2006). This perspective neglects the interactions that can occur between productive activities in different spheres of life and that are significant for assessing the “potential” of older adults. Older people are engaged in the labor market, family and civil society at different times. The temporal scope ranges from relatively spontaneous, short-term activities to daily routine acts, which can take up several hours a day. In order to draw a comprehensive picture of the commitment of older adults, it is important to consider several productive activities simultaneously and in relation to each other.

Only in recent years, empirical studies on the association between several productive activities in the late adult age have been conducted. Based on the existing evidence on the interdependence of productive activities (Choi et al., 2007; Burr et al., 2005; Mutchler et al. 2003), some studies also indicate that these activities form distinct groups or types within certain age groups in the second half of life (Burr et al. 2007; Morrow-Howell et al. 2011; Morrow-Howell et al. 2014). These studies concluded that productive activities such as paid work, voluntary work, informal assistance and care for older age groups are distinguishable types at the individual level. An analysis based on the Americans' Changing Lives Survey (ACL) identified four groups of productive activities (Helper, Home Maintainers, Workers/Volunteers and Super Helpers) in the 55-year-old age group (Burr et al. 2007). Similar findings were reported using a latent class analysis of the American Health and Retirement Study (HRS), which identified five activity profiles of older adults, which differed by type and scope of activities: low activity, moderate activity, high activity, employment and physical (Morrow-Howell et al. 2014).

Other empirical studies on the formal and informal activities of older adults have shown that the amount of resources available to a person (e.g. degree of formal education) as well as socio-demographic characteristics (e.g. sex or region of living) and social context play important roles in explaining commitment (Hank/Erlinghagen 2008; Wilson 2000; Wilson/Musick 1997a). With regard to the interdependency of productive activities, empirical studies show that individual (e.g. health, education), family and economic resources are positively associated with activity profiles showing a higher level of productive activities (Burr et al. 2007; Morrow-Howell et al., 2014). In addition, there is evidence of the influence of socio-demographic characteristics. As people grow older, participation in groups that is primarily characterized by activities outside their own households decreases while it grows in groups with activities within their own households. Furthermore, older women are often found in activity profiles characterized by family or household-related activities (Burr et al. 2007).

In order to describe and interpret the groups, not only the type of the productive activities is important, but also the patterns of the relations between these activities. As for the

types of activity, a distinction can be made between obligatory (e.g. care of a sick relative) and voluntary activities (e.g. civic engagement). The interrelationship between these two types of productive activities can be complementary or substitutive (Burr et al. 2007; Choi et al. 2007). A complementary relationship implies that, in the case of a person working in one area, the likelihood of being engaged in another area of activity is higher than in a person who is not engaged in a productive activity. In contrast, the probability of further productive activity in a substitutive relationship is lower. This distinction corresponds to the assumptions of the role theory, in particular the concepts of role extension (complementary relationship between productive activities) and role substitution or role overload (substitutive relationship between productive activities). The role extension hypothesis assumes that involvement in several productive activities is likely, as larger social networks offer the opportunity to engage in more than one activity. The results of several empirical studies support the assumptions of this hypothesis. For example, for selected European countries Hank and Stuck (2008) observed a complementary relationship between productive activities (voluntary commitment, informal assistance and caregiving). This relationship has been found in both mandatory and voluntary activities. A complementary relationship between voluntary engagement and numerous other areas of activity (e.g. adult education, leisure and cultural activity) was reported in a recent study of 65 to 80-year-olds from Belgium (Dury et al. 2016). Burr, Mutchler, and Carro (2005) report a complementary relationship between caregiving and voluntary commitment among 50-year-olds and senior citizens of the Americans' Changing Lives Survey (ACL). Even if the results of empirical studies on the link between paid work and voluntary engagement of older people are mixed, there is also evidence suggesting a complementary relationship between these two areas of activity (Dosman et al. 2006). Wilson and Musick (1997b) assume that jobs that require autonomy and personal initiative encourage older people to volunteer in civil society, as both activities are based on similar skills. In addition, paid work in retirement as well as civic engagement can be understood as a voluntary or optional activity, which is at least partly based on individual preferences (Burr et al. 2007), although financial necessities or normative expectations cannot be entirely ruled out as motives (Wilson/Musick 1997b).

In contrast to the role extension hypothesis, the role substitution or role overload hypothesis argues that there is a competitive relationship between productive activities. Fulltime care and employment are time-consuming activities that might result in physical or mental stress (Choi et al. 2007; Burr et al. 2007). Since familial engagement is founded on social norms, which are more or less of an obligatory nature, they leave the individual a certain scope of choice. Caring for relatives and for one's own children and grandchildren can therefore be seen as compulsory activities. With few exceptions (e.g. Burr et al. 2005), empirical studies have shown that compulsory activities are in competition with voluntary activities such as citizenship (Burr et al. 2007; Choi et al. 2007). Therefore, at least some of the empirical findings support the role substitution hypothesis.

4 Approaches to complement current retirement research

Building on the current state of research outlined in the previous sections, approaches for further retirement and transition research can be identified. One central aspect is the dynamics of retirement or labor market participation while at the same time receiving an old-age pension (i.e. post-retirement work or bridge employment). Thus the transition to retirement at the personal level often takes on the form of a process, which comprises a temporal and logical sequence of preference, intention and action. Thus, it is not automatically an abrupt change of two discrete, mutually exclusive states – work *and* retirement (Beehr 1986; Feldman 1994). Individual decision-making and commitment to one's current occupation play an important role in explaining the transition process. The

approaches converge in the concept of unretirement, which differs from the traditional notion of retirement as a retreat from social and economic life in that it involves the continuation of productive engagement in one or more domains of later life.

4.1 The transition to retirement as a decision-making or action process

It can be assumed that the phenomenon of “employment in retirement” is also subject to a process, beginning with a rather undefined notion, then to the very concrete action and its subsequent evaluation. This basic idea is elaborated in Feldman and Beehr (2011) and further developed with recourse to various psychological theories such as image theory, social identity theory or career stage theory. The retirement process is presented as a three-phase model in which future, past and present-oriented considerations alternate. These phases may well overlap. An essential characteristic of the first phase is an individual and rather vague idea of one’s future retirement. In the second phase, the individual reflects what has been achieved in his or her professional career and how he or she assesses “letting go” of their professional role in the upcoming transition to retirement. The last phase relates to the present, when retirement plans are implemented (Feldman/Beehr 2011). The rise of different theories to explain the different phases underlines the fact that the retirement process is a multivariate phenomenon. A major critical objection, however, is that the empirical observation of this concept is not consistent, since this diversity of theories is based on different, sometimes contradictory assumptions (e.g. regarding continuity versus disengagement or self-interested versus socially related behavior). Another general concern is with the violation of the “law of parsimony” (also known as Occam’s razor), which leads to a vast amount of theories and approaches that cannot be incorporated into empirical research in a satisfactory way. As a result, testing these theories with empirical data can support anything and nothing at the same time. In summary, what is needed is a unified, consistent theory that describes and explains the unretirement process along with an individual time perspective and that is embedded in social and structural contexts.

The research from the recent past deals with three phases of the entire action process, which are, however, considered in isolation: (1) willingness / intention (e.g. Micheel et al. 2010; Büsch et al. 2010), (2) retirement planning (e.g. Wöhrmann et al. 2013) and (3) actual action (e.g. Kohli et al 1993; Deller et al. 2009; Scherger 2013; Hochfellner/Burkert 2013).

Willingness / Intention: The willingness to work in retirement seems to be linked to socio-structural characteristics. Empirical studies suggest a positive link between the occupational position and the willingness to continue working in retirement. On the other hand, the willingness to continue working in retirement is in a negative context with the household income. The statistical significance of the findings was limited to women (Micheel et al. 2010). Furthermore, high motivation to work (among men) and self-assessed abilities (among women) are positive factors influencing the willingness to be employed in retirement (Büsch et al. 2010).

Retirement planning: The greater the expectation of the positive consequences of retirement with the previous employer and the greater the intention to continue working in retirement (with the same employer), the greater the commitment to postwork planning. Wöhrmann et al. (2013) show that the perception and processing of information about previous activities change once goals and expectations of retirement have been set. The latter result supports the empirical relevance of the “crossing the Rubicon” phase according to the model by Heckhausen and Gollwitzer (1987), which will be discussed in section 4.3.

Actual action – Labor market participation in retirement: The findings by Scherger (2013) underline the importance of social inequality for the above research question. In

particular, membership in a higher professional class is crucial for retirement. Good health and high educational levels support this phenomenon. Furthermore, an international comparison between Germany and Great Britain shows that the existence of opportunity structures is crucial for work in retirement (Scherger 2013). On the basis of three pooled cross-sectional samples of the German Ageing Survey (1996, 2002 and 2011), Hofäcker and Naumann (2015) observe a U-shaped pattern of work in retirement in the 2000s when formal qualifications are considered (Hofäcker/Naumann 2015). Hochfellner and Burkert (2013) show that work in retirement is widespread among those who are at risk of poverty. This finding was particularly noticeable in persons with migration backgrounds, as their occupational biographies were unfavorable compared to the native-born population, resulting in relatively low old-age pensions.

4.2 The concept of unretirement – a differentiated view

Labor market participation in late adulthood is at the center of a dynamic, action-theoretical approach to the explanation of different transitions into retirement. However, continued participation in the labor market is by no means the only productive activity of older adults, even though this is a major social force in modern life affecting social status as well as individual identity (Bonß 2001). Civic engagement and family support also play important roles in the cohesion of societies and generations. In retirement age, these informal activities suggest remarkable productivity potential of older people at least during the seventh and eighth decades of life (Mergenthaler et al. 2015). Together with the temporal and activity-related variability of retirement, a phase often defined negatively, this life phase is determined above all by what older adults do not do, namely paid work (Denton/Spencer 2009). We therefore propose supplementing current aging and retirement research with the positive or at least neutral associations of the concept of unretirement.

One of the most crucial and simultaneously most difficult aspects of retirement research is drawing a clear line between *work* and *retirement*, with important consequences for distinguishing between retirement and the novel episode in the modern life course of unretirement. Various reviews of the socially structured phenomena of retirement conclude that the following dimensions have to be taken into account when defining this line between these domains (Denton/Spencer 2009; Feldman 1994; Gustman/Steinmeier 1984; Hershenson 2016):

- Withdrawal from a significant sequence in the life course: “work”
- Age limit as an indicator for eligibility
- Receipt of an old age pension (excluding i.e. widow’s pensions)
- Reduced work commitment (either psychological commitment or actual working hours) or nonparticipation on the labor market
- Self-assessed retirement status
- A combination of these indicators

Regardless of the chosen combinations of indicators used to define retirement, one message we derive from these studies is that the concept of retirement – and therefore the concept of unretirement – needs to be clarified for the scientific audience, because contradictory results in retirement research can be explained to some extent by the use of different definitions of retirement (e.g. Beehr/Bennett 2015).

The concept of “unretirement” is defined as *a significant time span in higher adulthood characterized by exceeding legal retirement age with simultaneous receipt of an old-age pension, and by participating in at least one socially or economically productive activity, regardless of its duration or intensity.*

The concept of unretirement has several advantages over the established active or productive aging concepts:

- It avoids ex ante normative connotations of activities or ways of life as expressed in the term “productive aging” or “successful aging.”
- It refers explicitly to the institutionally anchored life phase of retirement, which in Germany is a significant feature of late adulthood.
- It is not a further life stage in the higher adult age, but rather a specific living situation, which can cover several life phases with varying durations. Thus, it indicates the heterogeneity as well as the temporal fluidity of the living conditions of older people.
- It is an integrative concept of higher adulthood, as it describes both productivity and consumption in different areas of life (employment, family work and civic engagement).

4.3 The Rubicon model of participation in post-retirement activities

The Rubicon model of Heckhausen and Gollwitzer (1987) is a basic concept used to describe and explain the decision-making process of labor market participation among older people, which includes the intention, the planning and the actual behavior as components of an individual decision-making process. The model enables us to distinguish between different phases of action on a timeline, and integrates intentions, goals and the evaluation of achieved goals on an individual level. The single phases are divided into either motivational or volitional entities. Motivation is seen as goal setting; therefore, motivational phases of the model answer the question of *what goals* are pursued by a person. Volition describes a form of motivation referring to goal aspirations, therefore, volitional phases answer the question of *how goals* that have already been set can be achieved (Achtziger/Gollwitzer 2010).

A special feature of the motivation phase for the above questions is concerned with the weighting processes that lead to the formation of an intent with regard to employment in retirement. If concrete action objectives and intentions are mentioned in this step, the “Rubicon” is crossed from the perspective of cognitive research (Heckhausen/Gollwitzer 1987). In other words, the individual is dealing with plans for employment in retirement. In this phase, preparatory measures are taken to pursue the goal such as gathering information about post-retirement work (initial empirical evidence in the German context can be found in Wöhrmann et al. 2013).

In the subsequent volition phase, the individual focuses on the aspects that lead to implementing the goal. As a conclusion, the action taken is assessed with regard to the success of the project as well as the positive and negative consequences of this action. The later, evaluating phase has not, to our knowledge, been addressed in retirement research. Typically, the impact of retirement is assessed by overall quality of life and health. Central research interests have hitherto been focused on how the affected people adapt themselves to their new situation in retirement (e.g. Thoits/Hewitt 2001; Kim/Moen 2001; Wang 2007).

The Rubicon model developed in motivational psychology was partly extended to other scientific disciplines (for a sociological explanation of migration behavior on the basis of the Rubicon model see Kley 2011). An extended Rubicon model can also be applied to the theoretical foundation of research on work in retirement: the procedural multi-level model of labor market participation in the transition to retirement. This is based on our own considerations as to how patterns of motivation and action can be modeled in the transitional phase to retirement and embedded in overlapping social structures.

The overarching conceptual framework for this is the life course perspective, which is concerned with considering individual age-dependent life events or transitions between different life phases (e.g. transition from school to work, marriage, transition to retirement)

and their consequences for different areas of life (Mayer 2001; Sackmann 2007). This sociological view is supplemented by the perspective of the psychology of life span, which explores the interaction between age-related changes in skills, attitudes, goals and contextual conditions (working environment, communal environment, social structures; Baltes et al. 2006). On the one hand, it is assumed that individual spheres of life are not isolated from each other, but are interrelated in different phases of life. The transition to retirement, for example, is characterized by the domestic partnership context and the partner's employment situation (Drobnič 2002; Pienta 2003). Consequently, isolated considerations of the connections between individual characteristics and the participation of older people in the three areas of paid work, civil society and the family are not sufficient, instead multi-dimensional explanatory approaches are needed that take into account the overlapping social and life course-related context of aging people (e.g. household situation, birth cohorts). Moreover, the life course perspective emphasizes that individuals act on the basis of previous experiences and resources, so that an "endogenous causal link" (Mayer 2001) exists at the level of individual life courses. For example, volunteer work in old age depends to a large extent on past volunteering in previous life phases (Erlinghagen 2008; Maas/Staudinger 2010).

After all, individual life courses and personal development are not determined by biological processes, but rather are shaped by social, cultural and institutional contexts (Baltes et al. 2006). The prevailing social image of aging (Ehmer/Höffe 2009) and opportunity structures are decisive contextual factors. In addition, the basic social structuring of life processes and situations becomes especially visible in international comparisons and points to their political formability. For example, on the basis of the Survey of Health, Age and Retirement in Europe (SHARE), Hank (2011) showed that productive activities of people aged 50+ are more common in (selected European) countries with a higher civil liberty index score (indicating more favorable opportunities for productive activities in older adulthood) and higher shares of social spending.

In order to meet this comprehensive conceptual framework, the classic Rubicon model is complemented by different elements that must be taken into account in the special decision-making and action situation of the retirement transition:

- On the micro level, the decision to continue working in retirement is made on the basis of a subjective situation in a multi-stage or circular process.
- This is different from the contextual factors on the meso level, which represent incentives and opportunities to decide for or against continued work. These include, for example, the willingness of the employer to continue employment, the partnership situation, family care or care services, generational relationships and civic engagement.
- At the macro level, socio-structural and institutional contexts as well as cultural orientations are considered that influence individual contexts and decisions regarding labor market participation (connected with regulated pathways into retirement by pension laws) in the sense of opportunities or restrictions (e.g. income and education distribution or social perceptions of aging). Considering social structures and contexts also enables us to explore labor market participation of older people that cannot be explained solely as an individual decision-making process, but, for example, as due to material or normative constraints.

Possible options of action following the assessment phase are the re-entry into the deliberating phase (if parameters have changed or have to be modified) or the stabilization of the behavior (Heckhausen/Heckhausen 2010; Achtziger/Gollwitzer 2010). We explicitly add the option of exiting from the action process. The exit as a successful action option is incorporated to depict the special conditions of the decision-making process about working after retirement, which is also influenced by stable socio-demographic factors such as age (Beehr/Bennett 2015) that lead to the abandonment of bridge employment planning. This is clearly distinguished from the abortion of the action in case that the action-related objectives have not been achieved, and is also socially acceptable from

a moral-economic perspective (Kohli 1987). Due to advancing age (connected with worsening health) and changed situational and contextual conditions (e.g. employment situation), an exit from the action model can take place without this being described as unsuccessful, since this is deliberately chosen and intended.²³

While in the psychological application of the model (e.g. in the goal to be physically active) an abortion of the action is regarded as an unsuccessful behavior (Heckhausen/Heckhausen 2010), this is more differentiated in the decision for or against the continuation of one's own employment beyond retirement age. After a period of work in retirement, an assessment of one's own actions will eventually lead to the exit from employment as the final departure from paid labor and thus exit the cycle of the phases of action. Findings from previous studies show that the desired duration of paid work in retirement is limited (e.g. Mergenthaler 2014). Bearing this evidence in mind, working life in retirement is understood by older adults as a time-limited phenomenon. It is therefore assumed that a final exit from working life is already planned during the volatility phase. In this case, no general stabilization of the behavior or re-entry into the deliberating phase is striven for. In addition, this option recognizes the diversity of life-drafts on a moral and political level and suggests no normative standard of action that would reinforce stigmatization of non-working retirees as unproductive. The freedom of choice, in the sense of self-determined aging, is thereby represented and furthermore an expression of old-age potential on an individual level (e.g. BMFSFJ 2005).

The deliberately planned exit option during the volition phase emphasizes the dynamic character of the model, since the evaluation phase is followed by a new form of the action, which is discussed on a different level. While a further action sequence is entered upon re-deliberation of the options for continuation of unretirement, the action continues in the existing form during stabilization. Withdrawal now entails a withdrawal from the action model and the target action it addresses. This idea adequately takes into account the specific situation of older people who prolong their employment but do not consider working until the end of life.

In addition, the model explores the elements of individual decision-making and action processes embedded in the specific context (on the meso and macro level). Thus, for example, the effect of paid work in retirement is to improve social status by increasing income. In addition, labor market participation may compete with other activities, such as childcare or voluntary work (Burr et al. 2007; Hank/Stuck 2008). The decision-making processes on the micro level are thus not only characterized by the features on the meso or macro level, but also have an effect on them. Thus, the procedural model of labor market participation in the transition to retirement corresponds to the principles of sociological multilevel models that explain individual actions in the context of social structures (e.g. Coleman 1990). Research and older people themselves profit from an interdisciplinary and transdisciplinary view of the process of aging and the synergies of the combination and further development of theories (Bengtson/Settersten 2016).

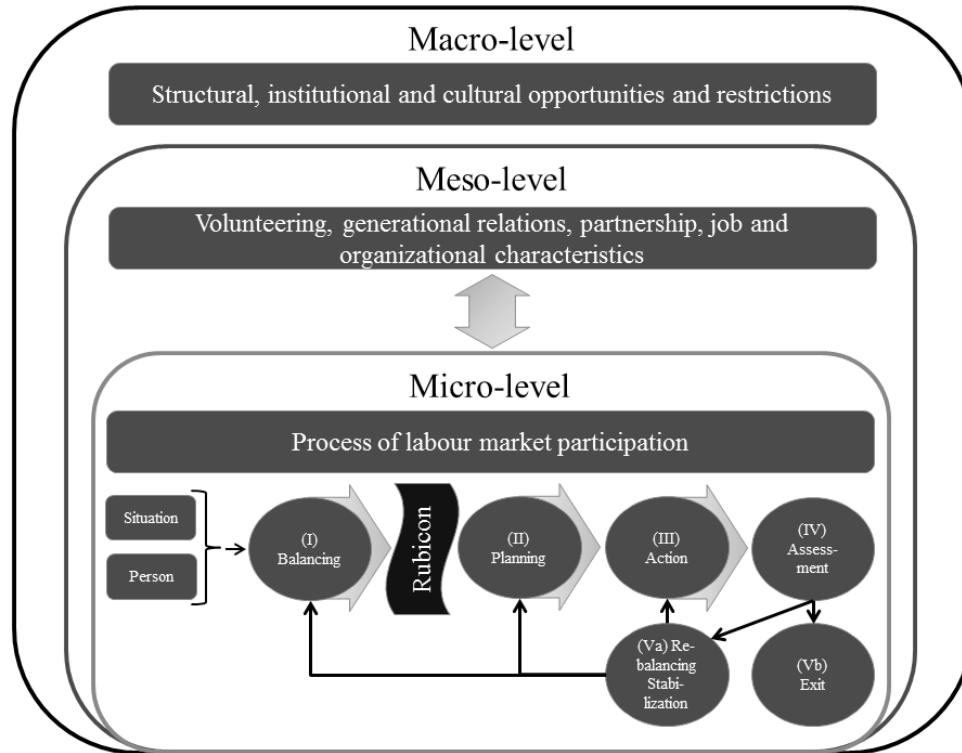
From these considerations, the overarching questions arise:

- Can the action and decision phases postulated in the model be confirmed empirically?
- What patterns of labor market participation can be observed? How do these patterns influence the course of retirement?
- Does the evaluation of the action as regards the achievement of objectives and consequences (1) lead to a re-evaluation of the situation, (2) to a stabilization of the behavior or (3) to a final exit from the working life?
- What influences of (1) social structural and cultural differentiation, (2) different forms of transition to retirement, (3) organizational structures, (4) civil engagement, or (5) of generations and partnership relations can be observed regarding the extent of labor market participation in older adulthood?

²³ Otherwise, working until death would become a dysfunctional option.

- How does continued work affect the social position in the transition to retirement? Is there a dynamic interaction between the socially structured action contexts and the individual decision-making process?

Figure 1: Model of dynamic labor market participation in the transition to retirement



Source: Authors' illustration

5 Summary and outlook

In the last few years, the discourse over the crisis of an aging population and its consequences for the social security systems has been enhanced by a perception of aging that emphasizes the skills and resources of older people as potentials for the economy and for society. This change in perspective is a result of a change in the aging process itself. While considerable numbers of previous birth cohorts were no longer able to perform productive roles when they reached retirement age, today's older adults, due to their good health as well as their knowledge and abilities, are able to remain active for several years – even in retirement. Based on this precondition, the transition to retirement is no longer equated with the onset of “being elderly” as a phase of increasing functional impairments and a retreat from social life. Further, due to accumulated social and health inequalities in the second half of life, we observe remarkable heterogeneity of individual aging processes, which makes late adulthood one of the most varied life segments of modern societies. As a consequence, not all members of a birth cohort can expect to reach the third age as a life stage of “...personal achievement and fulfillment” (Laslett 1987), especially when they belong to a socioeconomically deprived group. In contrast, the more privileged members of society, who have a better chance to age in a healthy way and to live longer compared to people from lower social classes (e.g. Huisman 2008) also have a higher probability of engaging in productive activities after the transition to retirement and of further developing their individual potential during the later stages of life.

Employment or the process of the age-related withdrawal from the labor market stands at the center of the transition to retirement and the productive roles of older adults, because in a modern work society, the labor market is a major institution with respect to social structuring cohesion over the life course (Kohli 1985). The long arm of this institution reaches even into retirement and should not be underestimated for social cohesion in a society of long life. The link between human aging and employment is manifested in at least two ways: firstly, in the form of age-related inclusion and exclusion by the labor process; the most visible sign for the latter is the legal retirement age, which simultaneously marks the beginning of “old age” as a separate life phase. Secondly, employment is indirectly age-exclusive, as it is generally no longer feasible due to institutionalized age limits, but also due to the mental and physical requirements for people in certain age groups.

A fundamental change on several levels has taken place in Germany over the last few years, particularly on the boundary between paid work and retirement. On the one hand is the institutional paradigm for prolonged working life, which finds its clear expression in the “pension at 67.” On the other hand, corporate culture is gradually beginning to adapt to older workforces, as reflected in a changing age climate in at least some German companies (e.g. Heckel 2013). Finally, older workers now enjoy better health and face a higher need for lifelong learning than was the case a few decades ago (Kocka/Staudinger 2009). Compared to previous birth cohorts, older workers today have higher working capacities, better conditions at the workplace and more flexible pension schemes, leading to a greater degree of freedom in designing their late job careers. In order to meet these larger spheres of influence, it is not enough merely to describe the labor market, legal or occupational contexts of labor market participation of older adults. Rather, it is necessary to adapt the models of action to the specific situations of labor market participation, which allow us to model individual decision-making processes and to understand their interactions with occupational and societal contexts. This article develops such an action model in the form of a modified Rubicon model. This heuristic framework will be used in future empirical studies to explain two phenomena: age-related withdrawal from the labor market and the continuation of employment beyond regular retirement age or the resumption of paid work in retirement.

Due to the importance of employment in modern work society – the tripartition of the life course in Germany (e.g. Kohli 1985) – there is no functional equivalent that can be characterized most appropriately in the post-working life phase as the “roleless role” (Burgess 1960). In the light of demographic change, especially when the baby boomers reach retirement age from 2020 onwards, this massive withdrawal from the socially active and inclusive institution of the labor market could also become a challenge for social cohesion beyond the issue of the financial sustainability of the statutory pension insurance system. What is needed to avoid a “roleless role” situation among future retirees is a reform of the labor market and of the threefold life course vested in employment, towards an age-inclusive form of employment. This would ideally allow for “fluid” forms of employment that could respond more flexibly to the needs of people and their social environment in different life phases and situations. Such flexible organization of employment allows enough space for other activities, such as volunteering, maintaining one’s health, individual training or family support. Older people could thus become a vanguard of a plural form of social and individual productivity, which can also serve as an example for upcoming generations. It is obvious that this scenario would primarily apply to the socioeconomically privileged members of the middle and upper classes (Lessenich 2009). For the members of socially disadvantaged classes, the goal is to alleviate existing disadvantages across the life course through targeted social policy measures aimed at the relative improvement of socio-economic life conditions.

The interactions between labor market participation in retirement and other productive activities, such as family work or engagement in civil society, therefore represent another research topic. While productive activities by older adults are usually presented as

isolated fields of activities, this paper advocates an integrative perspective that explores the compatibility of formal and informal work among older adults depending on social and economic preconditions. This approach is merged to form the concept of unretirement, which considers labor market participation and simultaneously the interaction with socially or family-related productive activities central economic dimensions. This conceptual augmentation could lead to a better understanding of work and productive activities in later life, in which the clear separation of paid work and volunteering is increasingly blurred. Thus, older adults could even become vanguards of a differentiated perspective on work that could also serve as a model for younger people in earlier life phases.

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