

SELF Project Line 5: Social Participation and (Early) Retirement

This project line focuses on the dynamic relationship between **employment, social participation and (early) retirement**, and on how individual agency, interdependence, independence, and self-efficacy affect the multi-dimensional transition to retirement occurring in contexts of multiple constraints. Both life course sociology and life span (health) psychology acknowledge retirement as a crucial transition in individual life courses. This applies to both the 'normal' employment exit around regular pension age and early retirement related to disability, which is often involuntarily permanent (Lippke et al., 2018). The complex transition to retirement, however, not only consists of the exit from paid employment or one's main career, but also includes the beginning or extension of other forms of social participation. Examples are family-related work (provision of long-term care, caring for grandchildren), physical activity (Cihlar & Lippke, 2018), voluntary engagement or new paid jobs, often part-time (Scherger & Vogel, 2018; Mergenthaler et al., 2018). For many women, pension age is a less relevant reference point because of the relative discontinuity of their careers and the importance of unpaid family obligations (e.g., Hokema & Scherger, 2016). As numerous other social policy-related transitions, the transition process to retirement is characterized by scope for individual agency, but also by social constraints shaped by context. Job loss, declining health, declining income, or declining health of significant others, are only the most important constraining circumstances. Faced with such constraints, individual selfregulation and self-efficacy are consequential for both social inequalities (objective and perceived) and well-being.

Projects in this area aim for the investigation of **perceived self-efficacy and agency**, not only with regard to paid employment, but also to **other forms of social participation**. Projects will also consider the potentially compensating or cumulative logic that different forms of work and social participation can have in the transition process to retirement. Potentially involuntary job loss leading to full retirement, e.g., and the related consequences for perceived self-efficacy and agency may be **compensated by taking up voluntary engagement** (Lengfeld & Ordemann, 2016). Previous research, however, shows that individuals with low social participation while working (i.e., few activities in addition to work) have a high likelihood to not compensate the decline in paid work, but to just participate to an even lesser degree when entering the retirement phase (Cihlar & Lippke, 2017). Dissertation projects will build on the assumption that these implications vary by gender roles and interdependence-independence as well as social context (household, income, class, or also country) and that different kinds of work and social participation go together with different opportunities to experience agency and self-efficacy. For example, compared to paid work and the provision of long-term care, volunteering rarely seems to be connected to decreases in well-being for older people, probably because it is based on (perceived) individual choice among independent individuals (Matthews & Nazroo 2015). However, is this also the case for individuals whose self-construal is more interdependent?

Early retirement related to incapacity and disability is an important special case of the theme in this research area. **Early disability retirement** implies a loss of agency in one important realm of social participation, namely paid employment, and has long-term implications for perceived self-efficacy. Looking at the dynamics of self-efficacy and potentially compensating influences in other areas of social participation (such as voluntary engagement) would add to our understanding of why disability

retirement most often leads to permanent exit from the labor market, and which favorable circumstances in terms of social participation may help to buck this trend.

The questions investigated in this project line lend themselves in particular to re-analyses of longitudinal quantitative data sets (e.g., TOP¹ and SPE-III²), but qualitative approaches studying the subjective (retro or prospective) views on the transition to retirement, perceived constraints and self-efficacy are also suitable to gain in-depth insights of individual perceptions, perceived agency, and the resulting actions. A further fruitful approach to the projects in this line is to conduct experimental field research in the form of randomized control trials which support individuals in increasing their social participation and agency.

Possible dissertation projects on social participation and (early) retirement:

- How do social constraints, varying by context and gender roles, interdependence/independence, affect (perceived) self-efficacy in the transition to retirement?
- How are constraints of agency/self-efficacy negotiated and dealt with?
- How is the self regulated, when faced with early (disability) retirement?

Potential supervisors:

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¹ Transitions and Old Age Potential (<https://www.bib.bund.de/DE/Forschung/Surveys/TOP/transitionsand-old-age-potential.html>)

² Drittes Sozialmedizinisches Panel für Erwerbspersonen (<https://www.zbv.uniluebeck.de/forschung/rehabilitative-versorgungsforschung/sektion-rehabilitation-und-arbeit/spe-iii-drittessozialmedizinisches-panel-fuer-erwerbspersonen.html>)

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